Searching Manual

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1 SEARCHING OVERVIEW

Relativity includes flexible search features designed to facilitate the document review process. These easily accessible features support a range of searching needs from filtering on fields and simple keyword searches to the development of complex queries. The following list summarizes the searching features available in Relativity.

Filters

You can use filters to limit the documents or items displayed in item lists on Relativity tabs and popups. When you enable the filters for an item list, you can set criteria on single or multiple fields, so that only matching documents or items are displayed in the view. Filters query across the searchable set of documents in the active view to return your results. Relativity supports multiple filter types so that you can easily choose the best format for different field types. See Filters on page 8.

Keyword Searches

You can run keyword searches from the Documents tab, and custom object tabs. With these searches, you can leverage the basic functionality for querying the SQL full text index populated with data from extracted text fields. The keyword search engine supports the use of Boolean operators and wildcards. It is the default search engine in Relativity automatically populated with extracted text during data import. See Keyword Searches on page 18.

Saved Searches

These searches provide you with the functionality to define and store queries for repeated use. With flexible settings, you can create a saved search based on any Relativity search engine, assign security to it, and define specific columns for your search results. Saved searches support the development of complex queries that you build using a form with search condition options. These queries run dynamically ensuring that an updated result set is displayed when you access a saved search. See Saved Searches on page 25.

dtSearches

Available on the Documents tab, you can use the advanced searching functionality to run queries with proximity, stemming, and fuzziness operators, as well as with basic features such as Boolean operators and wildcards. Relativity Administrators can create a dtSearch index for a specific subset of documents in a workspace, and then assign security to it. They must manually updated indexes when the document search sets used to create them are modified. See dtSearches on page 49.

Analytics

Supporting conceptual searching, Analytics includes documents in a result set when they contain similar ideas or conceptual relationships, rather than matching specific search terms or conditions. You can create searches with Analytics that categorize your documents based on the concepts contained in a sample document set. Instead of categorizing documents, you can also perform clustering, which uses specific algorithms (that is system defined rules) to identify conceptually related documents. See Relativity Analytics on page 65.

Additional Features

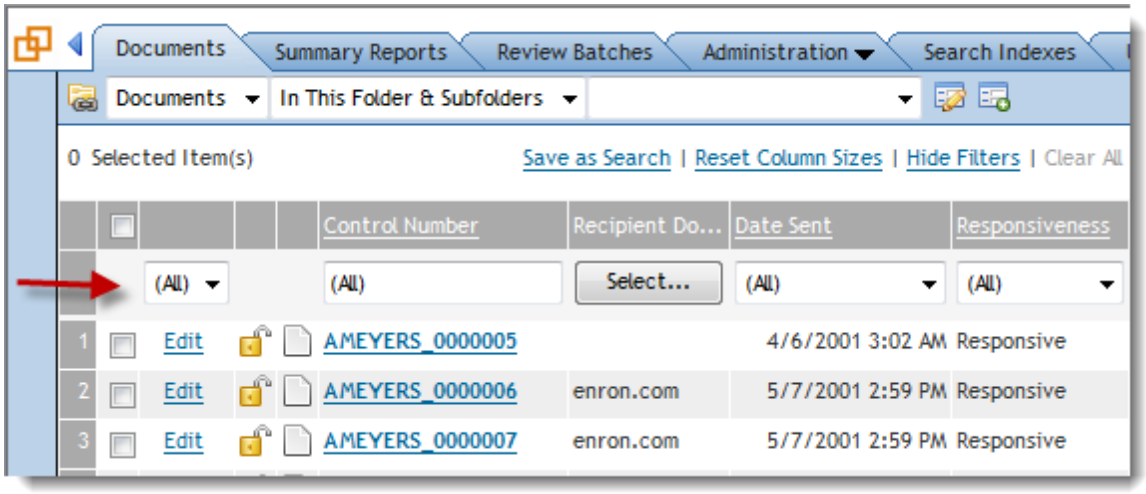
Relativity provides additional features that make searching easily accessible from the Documents tab. With the **Search Condition** option, you can build queries using the same condition options available for saved searches. You can use the **Save as Search** link also available on the Documents tab to create saved searches

based on the criteria that you defined for keyword searches, dtSearches, or Analytics as well as that defined with the Search Conditions option.

2 FILTERS

In Relativity, filtering provides a simple and fast way to search for a specific group of items in a list. Filters search for values in the fields displayed on the active view, and across all records available in the searchable set. They are available for the item lists displayed on tabs and popups. When you activate filtering, you will see options displayed at the top of each column in the item list. In the following example, the filters are displayed on the Document tab.

Filters in an item list



The filter type determines the steps required to set the search criteria that it uses. Some filters are textboxes, popups, or drop-down lists. You do not need any specific security permissions to use filtering just access to the item list or tab where you want to use it.

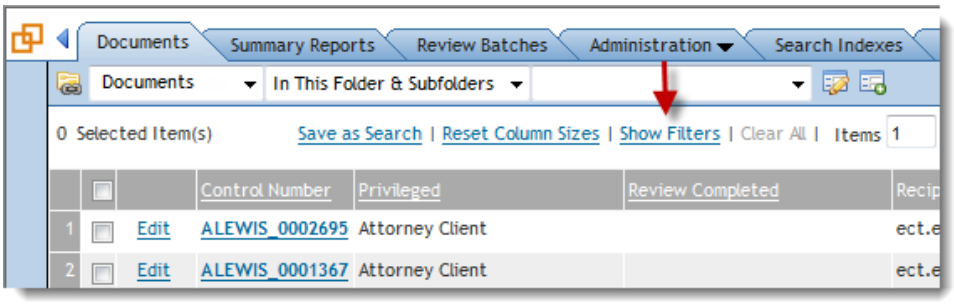
Note: *When you create or edit a field, you can select a* ***Filter Type*** *for it. The field type determines the available filter types. For more information, see the Relativity Admin Manual.*

2.1 Using Filters

Filter options are displayed above item lists displayed on tabs and in certain popups throughout Relativity. They include the following links:

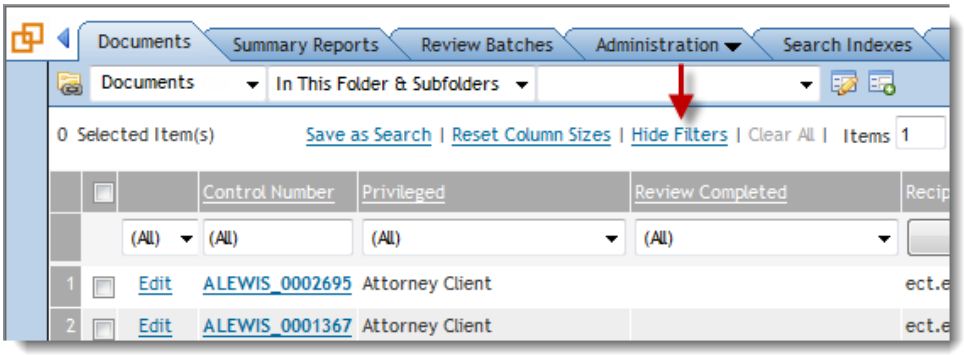
- **Show Filters:** Click this link to activate the filters for an item list. A filtering option displays at the top of each column. The filter type is determined at field creation. See Filter Types on page 10.

Show Filters link



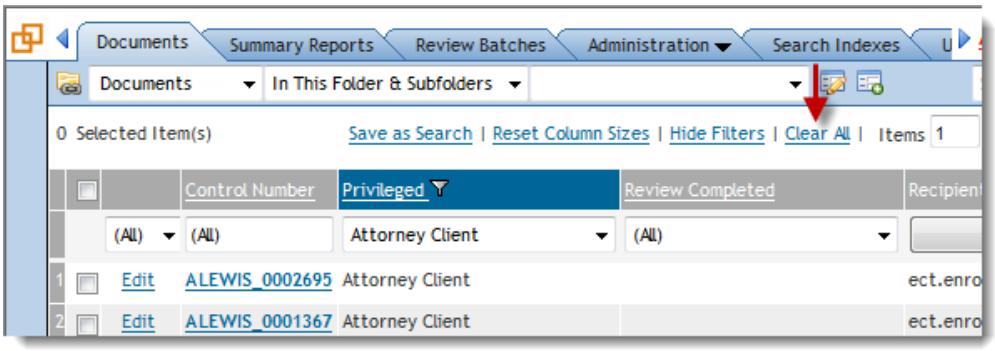
- **Hide Filters:** Click this link when you do not want the filtering options displayed. Your filter settings remained unchanged.

Hide Filters link



- **Clear All:** Select this link to remove the current filter settings. This link is only available after you set a filter.

Clear All link



Before defining a new search filter, click **Clear All** to remove the previous settings. For example, you create a filter on the Privileged field, but now want to search only by the Custodian field. If you do not clear the filters, your documents will be filtered by both the Privileged and Custodian fields, and your result set may not include all the documents that you expect.

2.2 Filter Types

After you activate filters, you may see a combination of textboxes, drop-down menus, and the **Select** buttons displayed at the top of the item list. These options are grouped into the following filter types:

- Boolean Filters on page 10
- CustomOnly on page 10
- List Filters on page 12
- Multi-list Filters on page 12
- Popup Pickers on page 13
- Textbox Filters on page 14

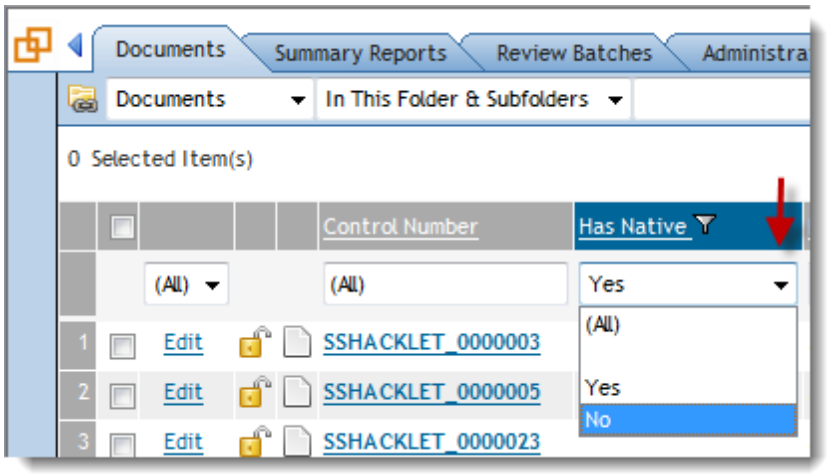
2.2.1 Boolean Filters

Boolean filters are available only on Yes/No field types. The conditions for this filter are displayed as a drop-down list similar to list filters.

To use a Boolean filter:

1. Activate filtering. See Using Filters on page 8.
2. Click the drop-down arrow.

Boolean Filter options



3. Select **Yes**, **No**, or **Blank** from the list. The previous illustration shows that the Has Native field uses a Boolean filter. If the filter is set to **No**, only documents that do not have native files will be displayed in the item list.

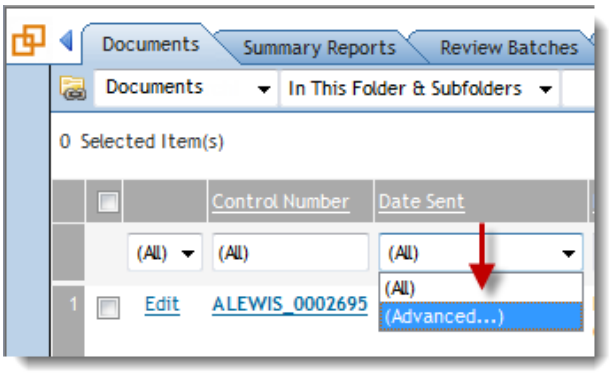
2.2.2 CustomOnly

With the CustomOnly filter, you can set filtering criteria, which uses a combination of advanced and Boolean operators.

To use a CustomOnly filter:

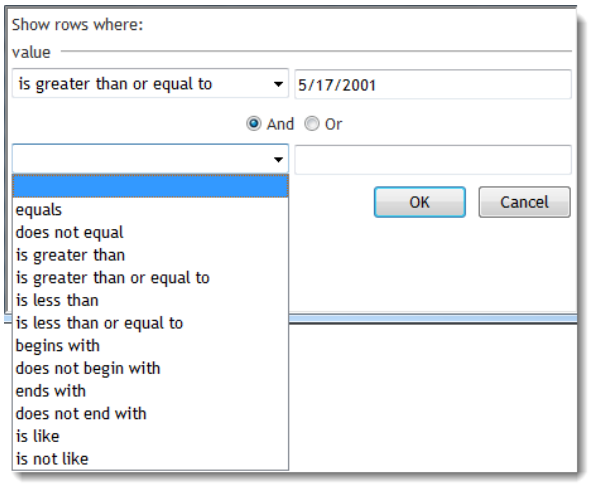
1. Activate filtering. See Using Filters on page 8.
2. Click the drop-down arrow on the column that you want to filter.

CustomOnly Filter option



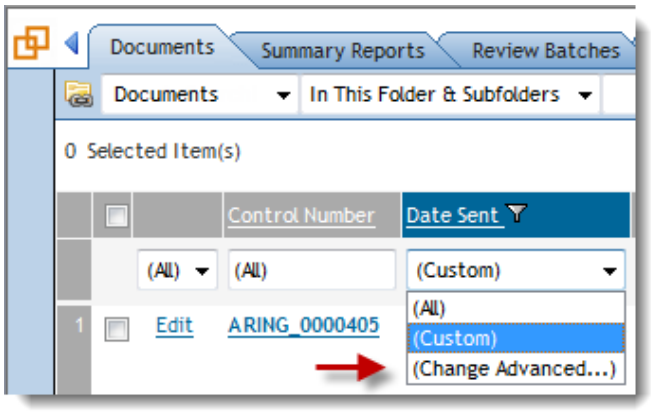
3. Select **(Advanced...)** to display a popup with filtering options. The field type determines the operators available in the popup.

Advanced Filtering options



4. To create a search criterion, select an operator from the drop-down box, and enter a value in the text-box. You can connect two search criteria with the AND or OR operators as illustrated above.
5. Click **OK** to set the filter. You can modify the filter by selecting **(Change Advanced...)** in the drop-down menu.

Change Advanced Filtering option



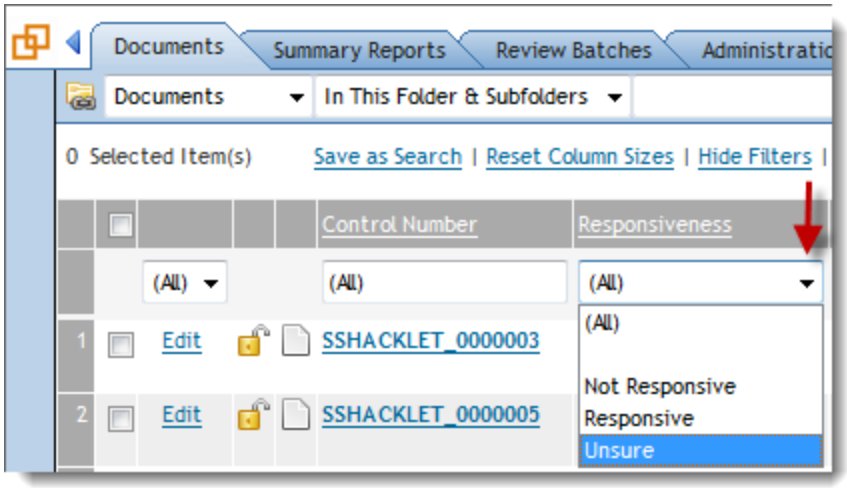
2.2.3 List Filters

List filters are frequently associated with fields used for coding documents. The conditions displayed in the drop-down for this filter vary by the type and purpose of the field associated with it. For example, a field called Responsiveness might have the filter conditions of Responsive, Not Responsive, or Not Sure. Similar to Boolean filters, you only filter on one condition at a time.

To use a list filter:

1. Activate filtering. See Using Filters on page 8.

List Filter options



2. Click the drop-down arrow.
3. Select a condition from the list. The previous illustration shows a field called Responsiveness with a list filter. If the filter is set to Unsure, only documents that have been coded with this value will be displayed in the item list.

2.2.4 Multi-list Filters

Using multi-list filters, you can select multiple conditions from a drop-down menu, and connect them with the OR or AND operator. These filters are frequently associated with fields used for coding documents, and their

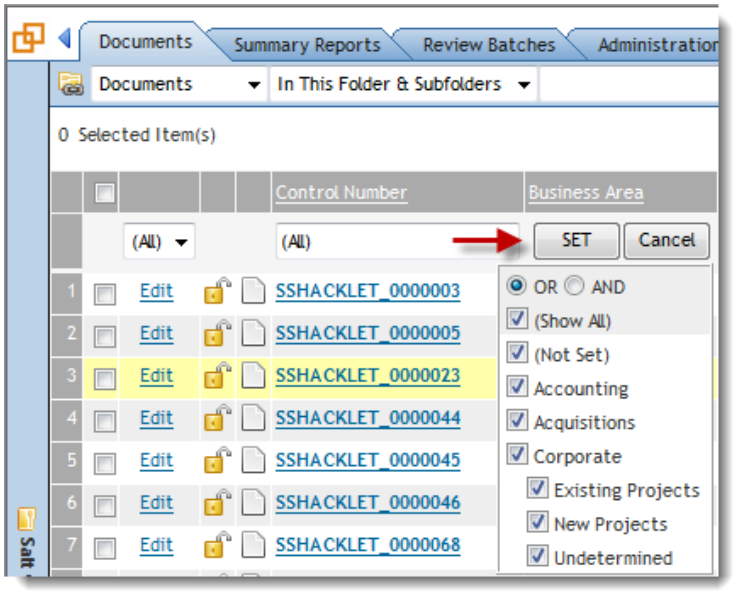
conditions vary by the type and purpose of the field.

To use a multi-list filter:

1. Activate filtering. See Using Filters on page 8.
2. Click the drop-down arrow to display a list of conditions.

> ***Note:*** *Clear the* ***(Show All)*** *checkbox to remove the default settings. You can then select only the conditions that you want.*

Multi-List filters



3. Select the **OR** or **AND** Operator.
4. Clear the conditions that you do not want included in the filter. Select those that you want in the filter. The **(Not Set)** condition filters on fields that have not been assigned a value.
5. Click **Set**. Only items that meet the filter conditions are displayed in the item list.

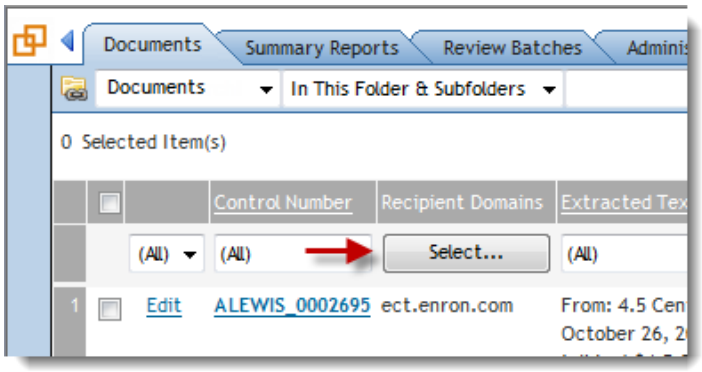
2.2.5 Popup Pickers

Using the popup picker filter, you can select values for multiple or single choice fields, as well as multiple or single object fields.

To select items in the popup picker:

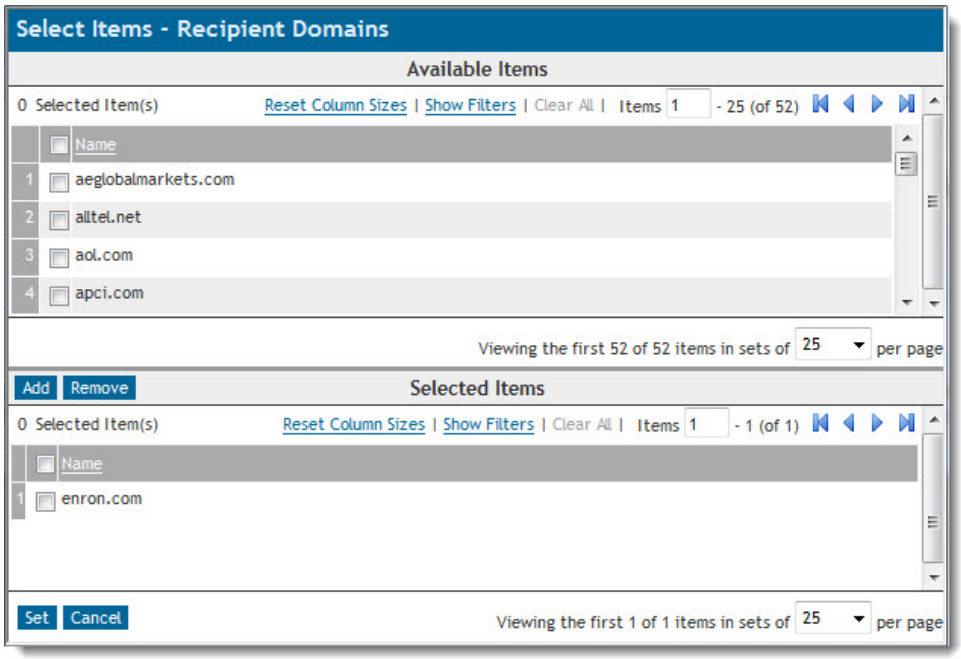
1. Activate filtering. See Using Filters on page 8.

Select button



2. Click the **Select** button for the column that you want to filter.
3. Select one or more items in the Available Items list. A checkmark indicates an item is selected.

Pop-up picker filter


Select Items - Recipient Domains
Available Items
0 Selected Item(s)
Reset Column Sizes | Show Filters | Clear All | Items 1 - 25 (of 52)
Name
1 aeglobalmarkets.com
2 alltel.net
3 aol.com
4 apci.com
Viewing the first 52 of 52 items in sets of 25 per page
Add
Remove
Selected Items
0 Selected Item(s)
Reset Column Sizes | Show Filters | Clear All | Items 1 - 1 (of 1)
Name
1 enron.com
Set
Cancel
Viewing the first 1 of 1 items in sets of 25 per page

4. Click **Add**. The items are displayed in the Selected Items list.

> ***Note:*** *To remove an item from this list, select it and click* ***Remove****. The item is displayed in the Available Items list.*

5. Click **Set**. The items are added to the **Value** box in the search form.

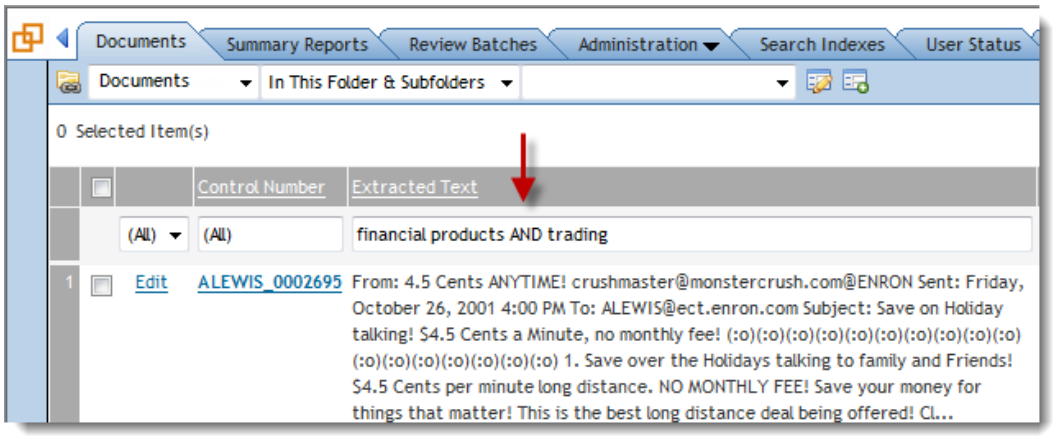
2.2.6 Textbox Filters

You can use textbox filters when you want to search on specific terms, numbers, and dates. You can enter single or multiple terms in the textbox connected by any of the following operators:

- AND
- OR
- BETWEEN
- = (equal)
- >= (greater than or equal to)
- <= (less than or equal to)

When entering terms and operators in a textbox filter, you must use the proper syntax as illustrated by the sample search strings in the following sections. Activate filtering to display the textbox. See Using Filters on page 8.

Textbox filter


Documents
Summary Reports
Review Batches
Administration
Search Indexes
User Status
Documents
In This Folder & Subfolders
0 Selected Item(s)
Control Number
Extracted Text
(All)
(All)
financial products AND trading
1
Edit
ALEWIS_0002695
From: 4.5 Cents ANYTIME! crushmaster@monstercrush.com@ENRON Sent: Friday, October 26, 2001 4:00 PM To: ALEWIS@ect.enron.com Subject: Save on Holiday talking! $4.5 Cents a Minute, no monthly fee! (:o)(:o)(:o)(:o)(:o)(:o)(:o)(:o)(:o)(:o)(:o)(:o)(:o)(:o)(:o)(:o)(:o)(:o)(:o) 1. Save over the Holidays talking to family and Friends! $4.5 Cents per minute long distance. NO MONTHLY FEE! Save your money for things that matter! This is the best long distance deal being offered! Cl...

2.2.6.1 Wildcards

The textbox filter treats a search term as if it were preceded and followed by a wildcard, and returns all versions of the term.

> ***Note:*** *Do not add an asterisk (*) to the beginning or ending of a search term. The filter will not return any results if you use this operator.*

2.2.6.2 Text Search Examples

You can perform text searches using Boolean operators, as well as filter alphabetically using greater than or equal to (>=) and other operators.

Boolean and Other Search Examples

The following table lists examples of valid search strings using Boolean and other operators.

Valid Search Strings	Returns Items Where...
cubs OR sox	([FIELD VALUE] like '*cubs*') OR ([FIELD VALUE] like '*sox*')
cubs AND sox	([FIELD VALUE] like '*cubs*') AND ([FIELD VALUE] like '*sox*')
cubs OR sox AND kcura	([FIELD VALUE] like '*cubs*') OR ([FIELD VALUE] like '*sox*') AND ([FIELD VALUE] like '*kcura*')
percent sign (%)	Use this operator to check whether the field is set to a value. It behaves like the "Is like" operator in a query. For

Valid Search Strings	Returns Items Where...
	more information about the "Is like" operator, see Fixed Length, Long, or Extracted Text Operators on page 39.
underscore (_)	Wildcard for a missing character. Do not use the underscore to check to see if a field is set to a value, as it is slower and more resource-intensive than using the percent sign (%) described above.
= with term	Returns an exact phrase.
cubs sox	Returns the exact phrase (that is the word cubs, followed by a space, and then the word sox).

Alphabetical Filtering Examples

The following table lists examples of valid search strings that you can use to filter alphabetically.

Alphabetical Filtering	Returns Items Where...
>= cubs	[FIELD VALUE] >= 'cubs'
<= cubs	[FIELD VALUE] <= 'cubs'
= cubs	[FIELD VALUE] = 'cubs'
= cubs AND sox	[FIELD VALUE] = 'cubs AND sox'
cubs BETWEEN sox	([FIELD VALUE] >= 'cubs') AND ([FIELD VALUE] <= 'sox')
Kcura and cubs BETWEEN sox	([FIELD VALUE] >= 'kcura and cubs') AND ([FIELD VALUE] <= 'sox')

Invalid Text Search Examples

The following table includes examples of invalid text search strings.

Invalid Search Strings	Description
cubs AND	The AND operator requires a right search term.
cubs OR	The OR operator requires a right search term.
AND cubs	The AND operator requires a left search term.
OR cubs	The OR operator requires a left search term.

2.2.6.3 Date and Number Search Examples

The following table lists examples of valid date and number searches, as well as the expected result set.

Valid Search Strings	Returns Items Where...
>= 7/24/2008	[FIELD VALUE] >= '7/24/2008'
<= 7/24/2008	[FIELD VALUE] < '7/25/2008'
= 7/24/2008	([FIELD VALUE] >= '7/24/2008') AND ([FIELD VALUE] < '7/25/2008')
>= 07/27/2008 1:23 PM	[FIELD VALUE] >= '07/27/2008 1:23 PM'
<= 07/27/2008 1:23 PM	[FIELD VALUE] <= '07/27/2008 1:23 PM'
= 07/27/2008 1:23 PM	[FIELD VALUE] = '07/27/2008 1:23 PM'
7/24/2008 BETWEEN 8/24/2008	([FIELD VALUE] >= '7/24/2008') AND ([FIELD VALUE] < '8/25/2008')
7/24/2008 1:23 PM BETWEEN 8/24/2008 3:45 PM	([FIELD VALUE] >= '7/24/2008 1:23 PM') AND ([FIELD VALUE] <= '8/24/2008 3:45 PM')

Valid Search Strings	Returns Items Where...
7/24/2008 BETWEEN 8/24/2008	([FIELD VALUE] >= '7/24/2008') AND ([FIELD VALUE] <'8/25/2008')
07/27/2008	([FIELD VALUE] >= '07/27/2008') AND ([FIELD VALUE] < '7/28/2008')
>= 100	[FIELD VALUE] >= '100'
<= 100	[FIELD VALUE] <= '100'
= 100	[FIELD VALUE] = '100'

Invalid Date and Number Searches

The following table includes examples of invalid data and number search strings.

Invalid Search Strings	Description
> 7/24/2008	The equal sign must be used with the greater than operator (as in >=).
< 7/24/2008	The equal sign must be used with the less than operator (as in <=).
>= 0/24/2008	The search string includes the value 0 for the month.
= 0/24/2008	The search string includes the value 0 for the month.
0/24/2008 BETWEEN 8/24/2008	The search string includes the value 0 for the month in the starting date.
7/24/2008 BETWEEN 0/24/2008	The search string includes the value 0 for the month in the ending date.
>= sd	The operator greater than or equal to cannot be used with characters.

3 KEYWORD SEARCHES

Relativity uses the keyword or SQL index search as its default search engine. You can use a keyword search to query a full text index. The extracted-text fields included in this index vary by workspace, so you may want to consult your Relativity Administrator for additional information.

You can use Boolean operators (AND, OR, NOT) in keyword searches, as well as quotation marks for exact matches, asterisks (*) for wildcards, and other features. If you want to draft queries outside of Relativity, use a plain text editor such as Microsoft Notepad to prevent the addition of characters or formatting that might return unexpected search results. See Running a Keyword Search on page 18.

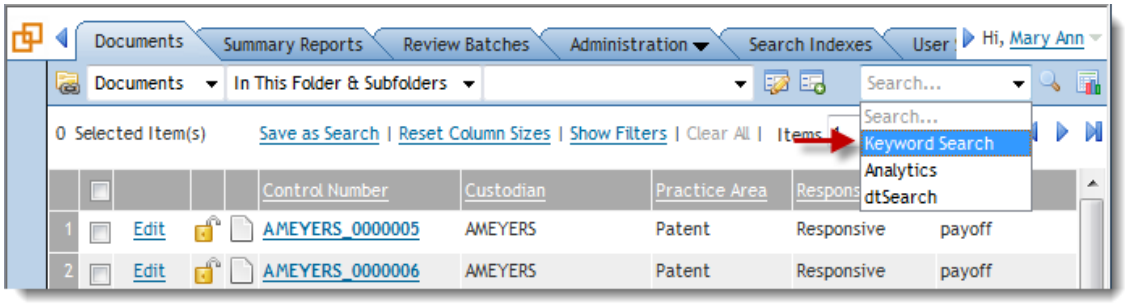
While the keyword search offers fewer options than other Relativity searches, it uses an index that is automatically populated, reducing maintenance and ensuring all required document fields are indexed. For more information on indexing, see the Relativity Admin Manual.

3.1 Running a Keyword Search

Use the following steps to run a Keyword Search. To access Searching online help, click the **Question Mark** icon displayed next to the **Clear** option.

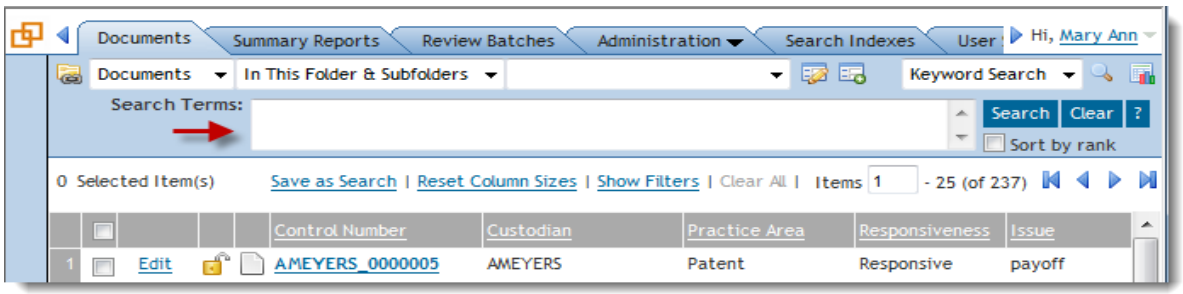
1. On the Documents tab, click the **Search With** drop-down, and select **Keyword Search** from the list.

Search With box



2. Enter terms for the search in the in the **Search Terms** box. You can click **Clear** to remove search terms from the box.

Search Terms box



The following table lists search string examples with their expected results. Also, see Understanding Stop Words on page 20.

Search String	Returns Documents with...
wired	the word wired
wired magazine	the words wired and magazine
wired AND magazine	the words wired and magazine
wired OR magazine	the word wired or the word magazine
wired, magazine	the word wired or the word magazine
"wired magazine"	the exact phrase wired magazine
wired NOT magazine	the word wired and not the word magazine **Note:** Do not start key word searches with the NOT operator, or use it with the OR operator. For example, these searches are invalid: ▪ not wired ▪ wired or not magazine See Using the NOT Operator in Keyword Searches on page 19.
wire*	any words beginning with wire, such as wired, wires, wireless **Note:** Key word searches do not support the use of wildcards at the beginning of a word. (Keyword searches are SQL index searches run on the Microsoft SQL Server, which does not support leading wildcards in full text searches.) See Running a dtSearch on page 49.
computer AND (wired OR magazine)	the word computer and the word wired OR the word computer and the word magazine **Note:** When a search string does not include parentheses, the order of precedence for a keyword search evaluates AND then OR expressions. For example, the search string A AND B OR C is evaluated as (A AND B) OR C.

3. (Optional) To display fields for search conditions, click the **Search Conditions** icon located next to the **Search With** drop-down. See Search Conditions on page 23.
4. Click **Search**.

3.2 Using the NOT Operator in Keyword Searches

You need to carefully format queries that use the NOT operator, when running a keyword search (that is an SQL full text search). For example, you may want to query for email messages that have Ryan as the author, but do not have Will as the recipient. The fields in the following record are included in the index used to demonstrate how this query is run:

Document	OCR	Recipient	Author
AS00001	From: Ryan To: Will	Will	Ryan

A keyword search using the string Ryan NOT Will returns the document AS00001 even though you would not expect it in the result set. The following table illustrates the SQL logic used to evaluate the query Ryan NOT Will.

SQL queries this field...	Returns these results...
OCR Field	Finds both Ryan and Will, so no document is returned.
Recipient Field	Does not find Ryan, so no document is returned.
Author Field	Finds Ryan but not Will, so the document AS00001 is returned.

When these fields are searched using the SQL logic, the Author field matches the query Ryan NOT Will, and unexpectedly returns the document.

Note: *You can use the AND NOT operator in a dtSearch as an alternative approach to this type of keyword search.* *See Boolean Connectors on page 54.*

3.3 Understanding Stop Words

When you run a keyword search, stop or noise words are ignored because they do not act as meaningful criteria in a query. They include characters (such as punctuation marks and single letters), numbers, and words (such as "at", "a", "on" and "the").

While keyword searches ignore stop words, their position in a phrase is taken into account when the query is executed. Records that contain phrases with same number of intervening stop words will be returned even when the stop words differ from those in the original phrase.

For example, the same set of documents is returned when you run the queries for the phrase "sun on my head", or "sun my on head". The result set will include documents that contain the words "sun" and "head" separated by two intervening stop words. A query for the phrase "sun on head" will return only those documents with one intervening stop word. The following table illustrates how the stop words in these phrases are handled.

Searching String	Queries for the Phrase...
sun on my head	"sun [stop word] [stop word] head"
sun my on head	"sun [stop word] [stop word] head"
sun on head	"sun [stop word] head"

However, if you replace a stop word with a meaningful word (such as "sun [stop word] tree head"), no documents will be returned since they do not contain this phrase.

3.3.1 Single Letters as Stop Words

Single uppercase and lowercase letters are default stop words, so you cannot query on them with a keyword search. Each single letter [A-Z and a-z] is considered a stop word.

However, you can query on a capital letter followed by a period, which the SQL search engine assumes is an abbreviation. For keyword searches, this functionality is available only on queries in the English language. It does not apply to lowercase letters followed by a period, which are still considered stop words.

3.3.2 Numbers as Stop Words

Single digits 0-9 are default stop words, so you cannot query on them with a keyword search. You will not return the expected results if you attempt to query on a single digit. Use the dtSearch feature to query on a

specific number or letter.

However, you can use a keyword search to query on whole numbers greater than 9. You can search on more than one digit, such as "09". While these digits may be used to represent a specific numeric value (such as 9), they are not considered single digits, and can be used in a keyword search.

3.3.3 Punctuation as Stop Words

Certain punctuation marks are treated as stop words by default, so you cannot query on them with a keyword search. They include:

- Period (.)
- Dash (–)
- Colon (:)
- Semicolon (;)

3.3.3.1 At Sign (@)

The at sign (@) is ignored in a keyword search, when it is used at the beginning of a query. For example, if you search a domain name, the same number of documents will be returned whether you include or exclude the @.

3.3.3.2 Hyphens and Dashes

When a search phrase includes a hyphen or dash, the query will return results that include terms containing other punctuation marks. For example, the following results will be returned for a search on the term "Pop-up":

- Popup
- Pop.up
- Pop--up

3.3.4 Default Stop Word List

Relativity is configured with the default stop words listed in the following table.

Begins with...	Stop Words
A	about, after, all, also, another, any, are, as, at
B	be, because, been, before, being, between, but, both, by
C	came, can, come, could
D	did, do, does
E	each, else
F	for, from
G	get, got
H	has, had, he, have, her, here, him, himself, his, how
I	if, in, into, is, it, its
J	just
L	like
M	make, many, me, might, more, most, much, must, my
N	never, no, now
O	of, on, only, other, our, out

Begins with...	Stop Words
S	said, same, see, should, since, so, some, still, such
T	take, than, that, the, their, them, then, there, these, they, this, those, through, to, too
U	under, up, use
V	very
W	want, was, way, we, well, were, what, when, where, which, while, who, will, with, would
Y	you, your

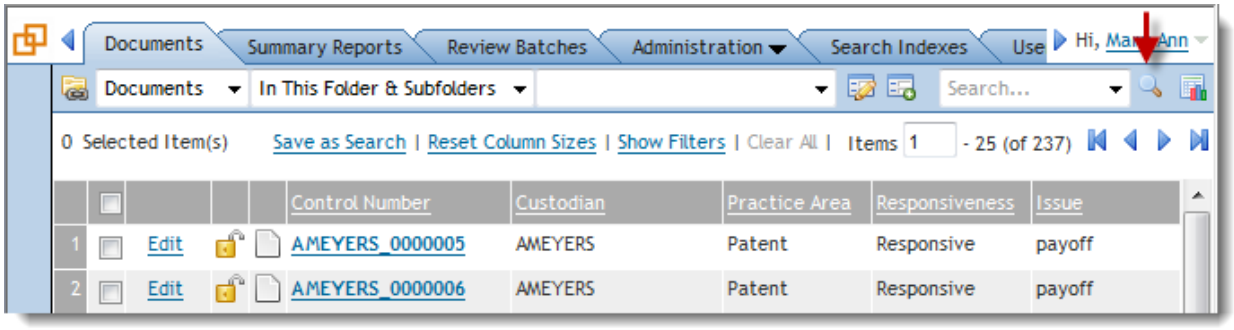
4 SEARCH CONDITIONS

You can use the Search Conditions option to build complex queries by selecting fields, operators, and values. While this feature has the same functionality as the Search Condition section of the Saved Search form, it is conveniently available from the Documents tab and the custom object tabs. This option displays up to five rows, which each represent a separate criterion. Depending on the type of field you select, there will be different operators available. You can use this option in conjunction with keyword searches, dtSearches, Analytics, Pivot or by itself.

***Note:** To use the Search Conditions option, you must have add or edit permissions for **Search**, and access to the **Saved Searches Browser** assigned to you through the Security page. For more information, see the Relativity Admin Manual.*

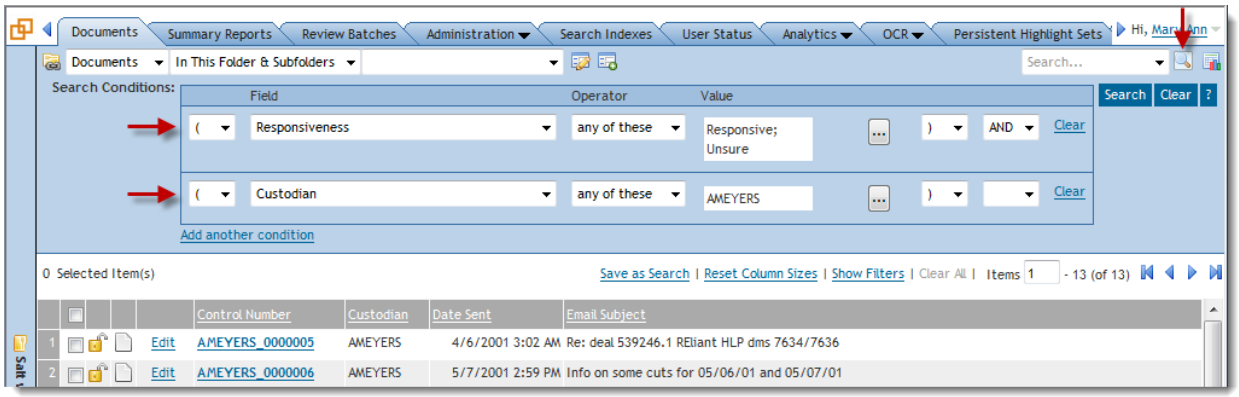
1. Navigate to the Documents tab or to a custom object tab.

Search Conditions icon



2. Click the **Search Conditions** icon to display fields for a search condition. (The appearance of the **Search Conditions** icon is updated to indicate that conditions are active.)

Search Condition fields



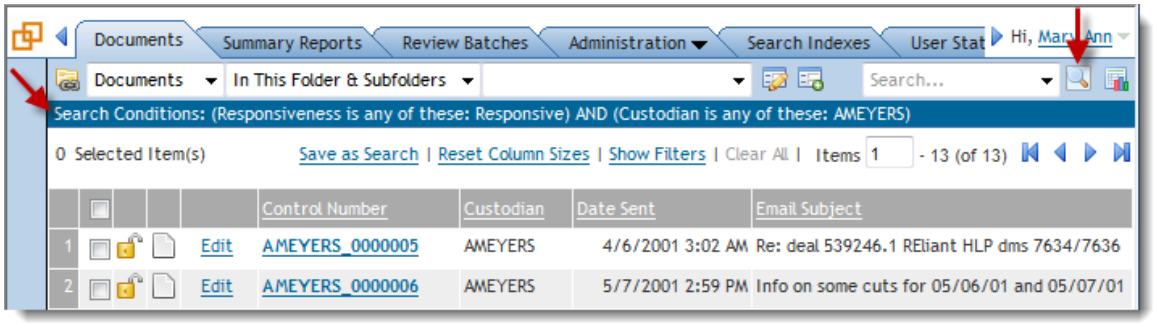
3. Set the following options to define a search condition:
   - **Left or Opening Parentheses:** Use the first box in the row to select a single, double, or triple parentheses for grouping criteria or controlling precedence in the query.
   - **Field:** Select a field available in your workspace.

- **Operator:** Select a search operator. The field type determines the available operators. See Operators on page 38.
- **Value:** Enter or select a value. The field type determines the available values.
- **Right or Closing Parenthesis:** Use the last box in the row to select a single, double, or triple parentheses to group criteria.
- **AND or OR Operators:** Use these operators to connect the criterion in each row.

> ***Note:*** *To remove your current selections for a condition, click the* ***Clear*** *link for the row.*

4. (Optional) Click **Add another condition** to display another search condition row. Repeat Step 3 to set the options in the new row. You set a total of 5 conditions with the Search Conditions option. If your query requires more than 5 conditions, create a saved search. See Creating or Editing a Saved Search on page 28.
5. Click **Search**.
6. (Optional) Perform any of the following tasks to work with your search:
   - **Hide Search Conditions:** Click the **Search Conditions** icon . A message displays above the item list indicating that the search conditions are active.

     Message with active search conditions

     
     Documents
Summary Reports
Review Batches
Administration
Search Indexes
User Stat
Hi, Mary Ann
Documents
In This Folder & Subfolders
Search...
Search Conditions: (Responsiveness is any of these: Responsive) AND (Custodian is any of these: AMEYERS)
0 Selected Item(s)
Save as Search | Reset Column Sizes | Show Filters | Clear All | Items 1 - 13 (of 13)
Control Number
Custodian
Date Sent
Email Subject
1 Edit AMEYERS_0000005 AMEYERS 4/6/2001 3:02 AM Re: deal 539246.1 RElIant HLP dms 7634/7636
2 Edit AMEYERS_0000006 AMEYERS 5/7/2001 2:59 PM Info on some cuts for 05/06/01 and 05/07/01

   - **Save Search Settings:** Click the **Save as Search** link. See Saving Searches on the Documents Tab on page 35.
   - **Remove Search Settings:** Click the **Clear** button to remove the current conditions and any search type settings.

5 SAVED SEARCHES

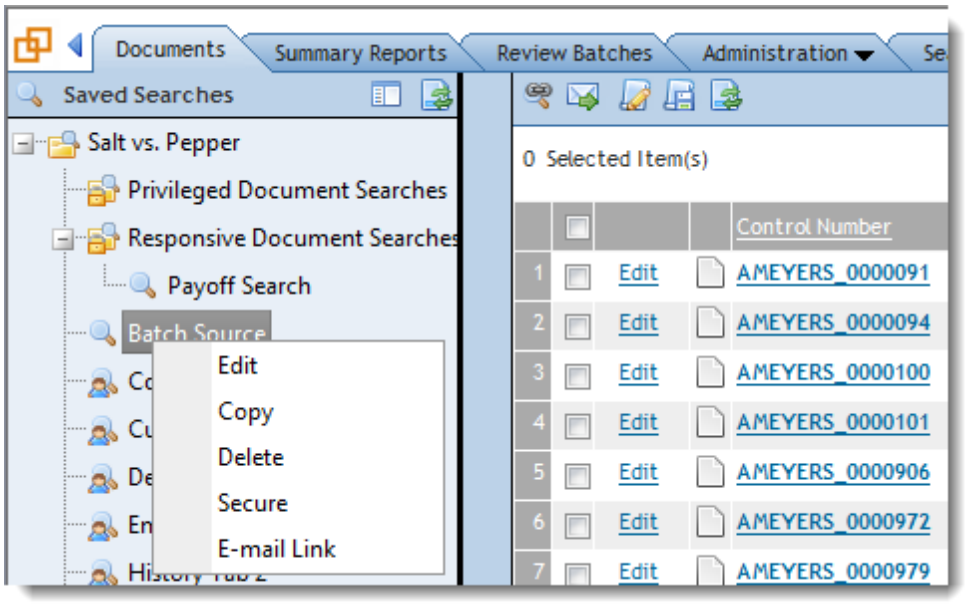
In Relativity, you can create saved searches by defining custom queries, and unique views, as well as by selecting public or private security settings, specific folders to query, and nested sort orders. You can also execute the search on the fly, save it for later use, or perform a combination of these tasks. Since saved searches are executed in real-time, you save the search definition but not the results. Relativity executes the search each time your click on it in the Saved Searches browser, and when you return to it after performing other tasks in the product. This functionality ensures that only data meeting the search criteria is returned in the result set. (You can set the **Requires Manual Rerun** option to control this functionality.)

You also use saved searches as the building blocks in other Relativity features. For example, you are required to select a saved search when you create batches, build a dtSearch or Analytics index, define an imaging set, and perform other tasks in Relativity.

5.1 Navigating the Saved Searches Browser

On the Documents tab, you can view the Saved Searches browser by clicking the **Saved Searches** icon. This browser provides you with features used to create, organize, edit, and perform other tasks with saved searches.

Saved Searches browser – available options



The following table displays options available in the Search Folder Tree.

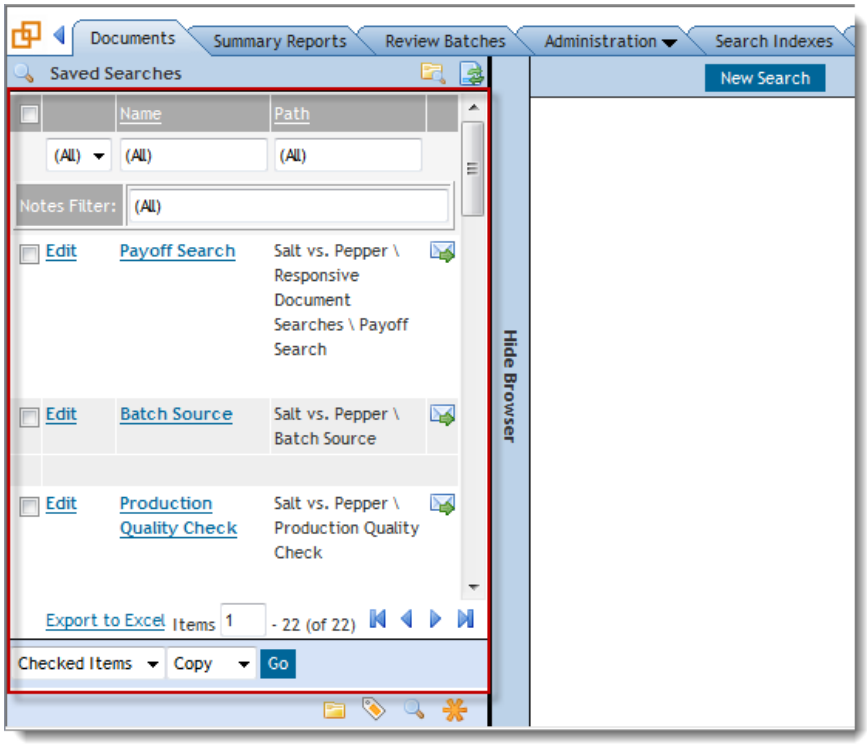
Option	Description
New Search Button	Click to display the Saved Search form. To display this form, you can also click on any folder, including the root folder.
Public	The icons display next to the name of a saved search to indicate its visibility.

Option	Description
or Private	
Search List	Displays saved searches in a list view. See Using Search List Options on page 26.
Refresh	Refreshes the list view and tree hierarchy. Note: Relativity automatically performs a refresh when you create a new search or modify an existing one. However, you need to click Refresh to display new searches or modifications to existing ones made by other users.
Show Current Path	Displays the location of the search. For example, the path Salt vs. Pepper\Admin\Batch Source indicates that the search is located in a Batch Source subfolder contained in the Admin folder, which is under the root folder Salt vs. Pepper.
E-Mail Icon	Opens an e-mail message containing a link to the saved search. The Subject line is pre-populated with the following text: "Relativity Review - <Workspace Name> - <Search Name>." When the recipient clicks on the link, the saved search is displayed with the current result set. Note: Relativity will display a permissions denied message if the recipient clicks the link to display the search but does not have access rights to it.
Edit Search	Displays the Search Form for updating search criteria.
Save Search	Click to display a pop-up where you can select a new Owner, and modify the search name. See Creating or Editing a Saved Search on page 28.
Search Right-click Menu	Highlight a search in the folder tree to display a right-click menu with the following options: ▪ Edit: Displays the Saved Search form, where you can modify the current settings for the search. ▪ Copy: Adds a duplicate of the search to the tree. ▪ Delete: Permanently removes the search from the database. ▪ Secure: Available on public searches, this option displays a security page so that you can override the security inherited from the workspace, or parent folder. For more information about security, see the Relativity Admin Manual. ▪ E-mail Link: Opens an e-mail message containing a link to the saved search. For additional information, see the description for E-mail Icon.
Folder Right-click Menu	Highlight a folder to display a right-click menu for managing folders. See Organizing Saved Searches in Folders on page 46.

5.1.1 Using Search List Options

To display saved searches in a list view, click **Search List** in the folder tree.

Search list view



The following table lists options and information available in the Search List View.

Option	Description
Search Folder Tree	Displays saved searches in a tree hierarchy.
Edit Link	Click this link to display the Saved Search form, where you can modify the current settings for the search.
Name Link	Click this link to display documents returned by the search in the item list. You can open documents from this list.
Path	Displays the location of the search. For more information, see **Show Current Path** icon.
E-Mail Icon	Opens an e-mail message containing a link to the saved search. The Subject line is pre-populated with the following text: "Relativity Review - <Workspace Name> - <Search Name>." When the recipient clicks on the link, the saved search is displayed with the current result set. **Note:** Relativity will display a permissions denied message if the recipient clicks the link to display the search but does not have access rights to it.
Sorting	Click a column heading to sort in ascending order (**Down** arrow displays), or click twice to sort in descending order (**Up** arrow displays). Click a descending sort to clear it, and to display the original sorting order.
Export to Excel	Click this link to create and download an Excel spreadsheet with a list of saved searches.
Paging	Click on arrows at the bottom of the browser to display the next or previous page of searches, as well as first or last page of the entire list.

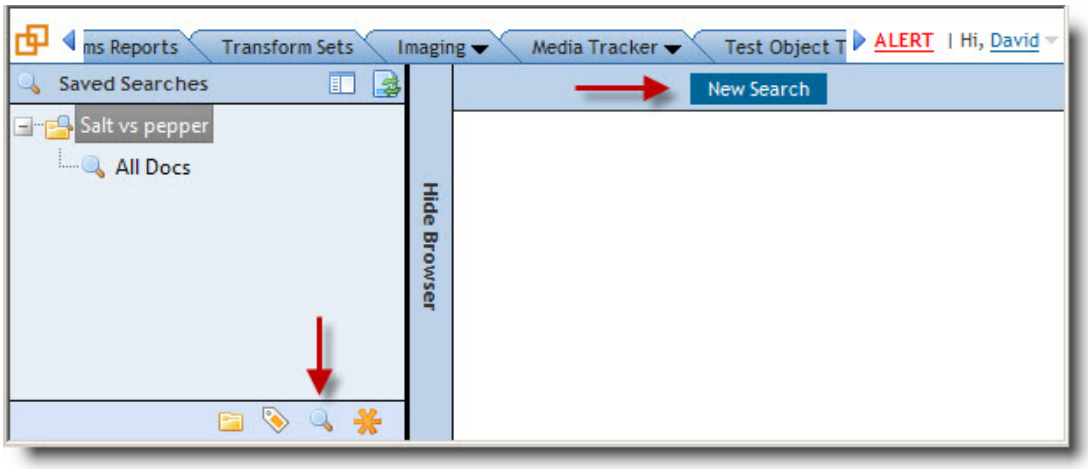
Option	Description
Mass Operations	Select searches for a mass operation. Next, select **Copy** or **Delete** in the drop-down box at the bottom of the browser. Click **Go**. For more information on mass operations, see the Relativity Admin Manual or the User Manual.

5.2 Creating or Editing a Saved Search

Use the following instructions to create a saved search, or to update an existing one. To access Searching online help, click the **Question Mark** ? icon displayed next to the **Search With** option.

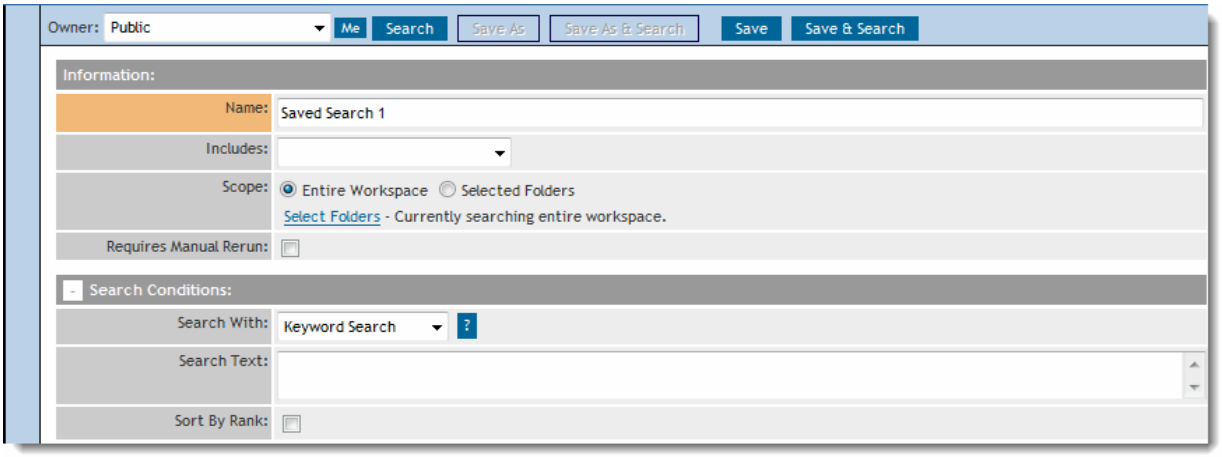
1. Click the **Saved Searches** icon in the browser. The browser displays a list of any existing saved searches that may be organized in folders.

Saved Searches browser



2. Click **New Search** to display the Saved Search form. (To edit a search, right-click on it, and select **Edit**.)

Partial view of Saved Search form



3. From the **Owner** menu, select **Public** to make the search available to all users or choose a specific user from the list. Click **Me** to select your name from the list, making the search private. (Users must have the appropriate privileges to view searches.) See Controlling the Visibility of Saved Searches on page 38.

4. Select settings for the following sections of the form. Use the information in these topics to update the options available in the form:
    - Information on page 29
    - Search Conditions on page 30
    - Conditions on page 31
    - Fields (Required) on page 31
    - Sort on page 32
    - Other on page 33
5. Click one of the following buttons to save your changes.

Button	Availability	Action Description
Search	New and Existing Searches	Runs the search and displays the results, but does not save your search criteria, or any modifications made to an existing search.
Save As	Existing Searches	When you edit a search, this action saves it as a new search, but does not run it. If you do not modify the search name, you are prompted to edit the search name, or save it as a duplicate.
Save As & Search	Existing Searches	When you edit a search, this action saves it as a new search, runs the search, and displays the results. If you do not modify the search name, you are prompted to edit the search name, or save it as a duplicate.
Save	New and Existing Searches	Saves your search criteria, but does not run the search.
Save & Search	New and Existing Searches	Saves your search criteria, runs the search, and displays the results.

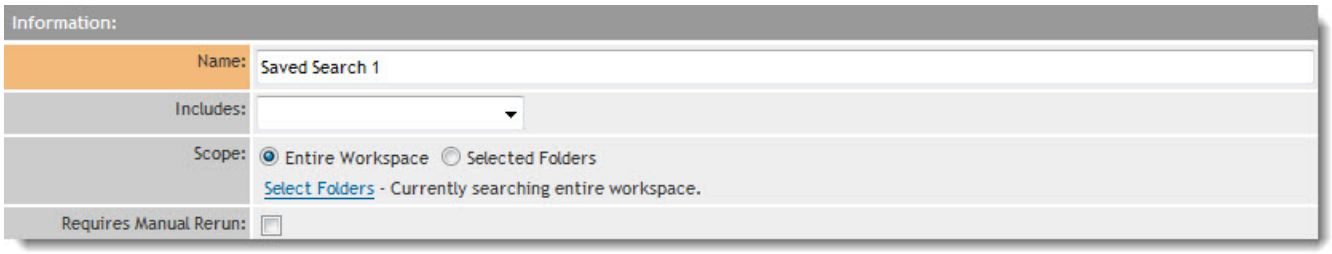
5.2.1 Saved Search Form

You will modify the settings on the Saved Search form when you create a new search or update an existing one.

5.2.1.1 Information

In the Information section, you designate a name, and define the scope of a search.

Saved Search form - Information section



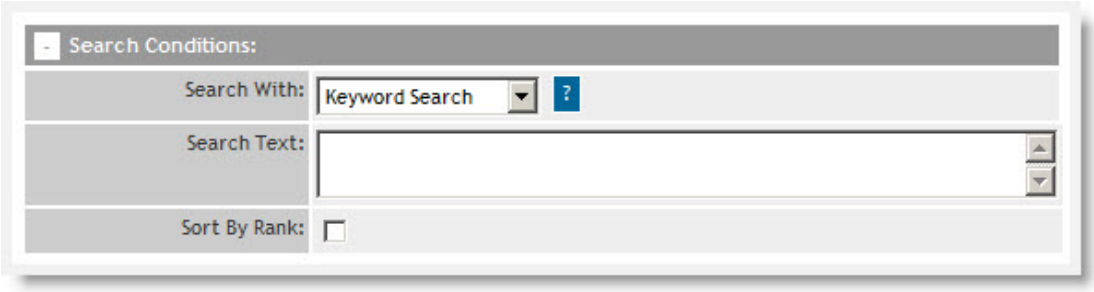
The following options are available in this section:

- **Name:** Enter a title for the search.
- **Includes:** Select an option for returning documents related to hit documents. (Hit documents match the search criteria.) The related documents will be included in the result set, but they do not need to match the search criteria.
    - **Include Duplicates:** Use this setting if you want the result set to include documents with the same MD5 Hash values as the hit documents. (The MD5 Hash value is used as a unique file identifier.)
    - **Include Family:** Use this setting if you want the result set to include documents with the same group identifiers as the hit documents.
    - **Include <Custom Field>:** Your organization may use custom related fields. Contact your Relativity Administrator for additional information.
- **Scope:** Select one of these options to designate the document set for the search:
    - **Entire Case:** All documents in the workspace are searched.
    - **Selected Folders:** Select this option, and then click **Select Folders**. On the Select Folders pop-up, choose the checkboxes for the folders that you want to search. Clear the **Include Subfolders** checkbox on the pop-up if you do not want subfolders included.
- **Requires Manual Rerun:** Select this option if you want users to rerun a saved search when they return to it after navigating to other features in Relativity. This option ensures that users are always seeing up-to-date search results. See Running Out-of-Date Saved Searches on page 48.

5.2.1.2 Search Conditions

Use the Search Conditions section to choose a search engine and set certain query options. To display Searching online help, click the **Question Mark** ? icon located next to the **Search With** option.

Search Conditions section



- **Search With:** Select Keyword, dtSearch, or Relativity Analytics index for your search engine.

  Note: *You will not see the Search With option displayed when only a Keyword Search index exists. In addition, the* ***Search Text*** *option is displayed only for Keyword Searches, while other options are available for dtSearches and Analytics. Your selection for the* ***Search With*** *option does not affect the availability of Field, Operator, or Value options displayed in the Conditions section of the form.*

- **(Keyword Only) Search Text:** Enter search terms or conditions. See Keyword Searches on page 18.
- **(dtSearch Only) Search Terms, Fuzziness Level, or Enable Stemming:** Enter search terms, and select settings as necessary. See dtSearches on page 49.
- **(Analytics Only) Keywords, Fuzziness Level, Concepts, Min Concept Rank:** Enter terms and select settings as necessary. See Relativity Analytics on page 65.

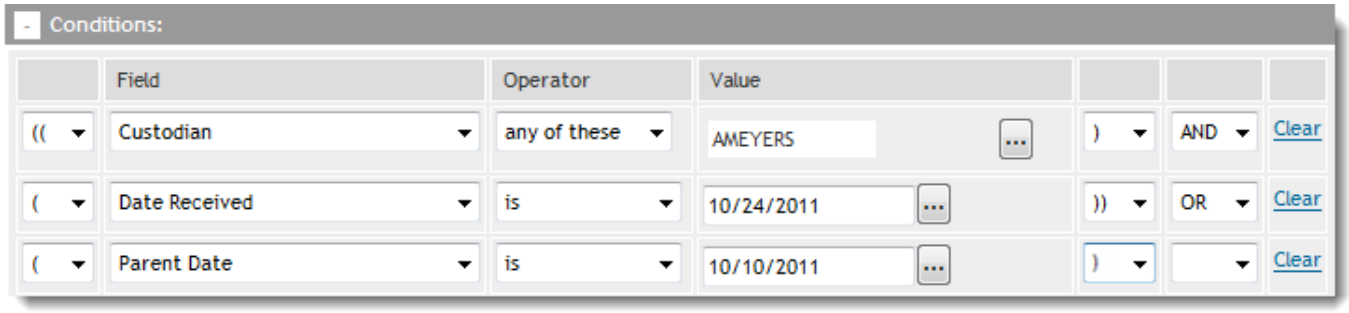
- **Sort by Rank:** Select this option to return results in order by relevance. The most relevant documents are listed at the top of the result set.

5.2.1.3 Conditions

In the Conditions section, you set multiple search conditions to create complex queries. Each row represents a separate criterion. Depending on the type of field you select, there will be different operators available. Each box within the row represents a different part of the query:

- **Left or Opening Parentheses:** Use the first box in the row to select a single, double, or triple parentheses for grouping criteria or controlling precedence in the query.
- **Field:** Select a field available in your workspace.
- **Operator:** Select a search operator. The field type determines the available operators.
- **Value:** Enter or select a value. The field type determines the available values. See Using Pop-up Pickers on page 33.
- **Right or Closing Parenthesis:** Use the last box in the row to select a single, double, or triple parentheses to group criteria.
- **AND or OR Operators:** Use these operators to connect the criterion in each row.

Conditions section


Conditions:
Field
Operator
Value
((Custodian any of these AMEYERS) AND Clear
(Date Received is 10/24/2011)) OR Clear
(Parent Date is 10/10/2011) Clear

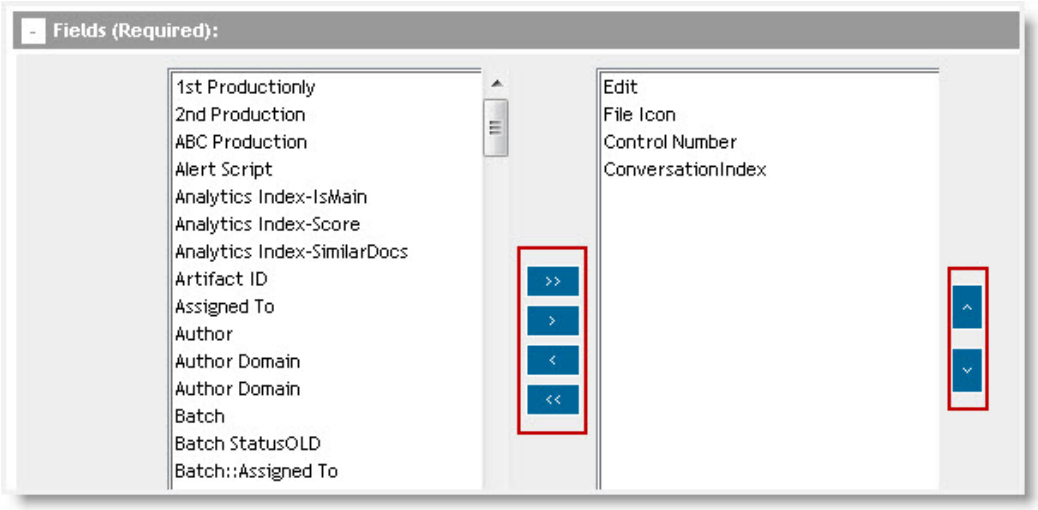
To remove a condition, click **Clear** for the associated row.

5.2.1.4 Fields (Required)

You can choose the fields displayed for the hit documents returned as search results by modifying the contents of the following boxes:

- **Available Fields:** These fields are listed in left box.
- **Selected Fields:** These fields are listed in the right box, and they will be displayed for your search results. They are ordered based on their position in this box, with the topmost field located on the right in the item list.

Fields (Required) column



Use the following options to move the fields between the Available and Selected Field boxes:

- **Move a Single Field:** Highlight a field and click the **Right** or **Left** single arrow. You can also double-click on a field name.
- **Move Multiple Fields:** Hold the **SHIFT** key down. Click on a range of fields that you want to move, or drag the mouse over these fields. Click the **Right** or **Left** single arrow to move the fields between boxes.
- **Move All Fields:** Click the **Right** or **Left** double arrow to move all the fields from one box to another.
- **Change the Selected Fields Order:** Use the **Up** and **Down** arrows to reorder the fields. Topmost fields display as a columns on the left of the item list, while fields at the bottom display on the right.

***Note:** You can edit the default list of selected fields displayed in this option. On the Views tab, click **Default Search Views**, and then click **Edit** to update the field list.*

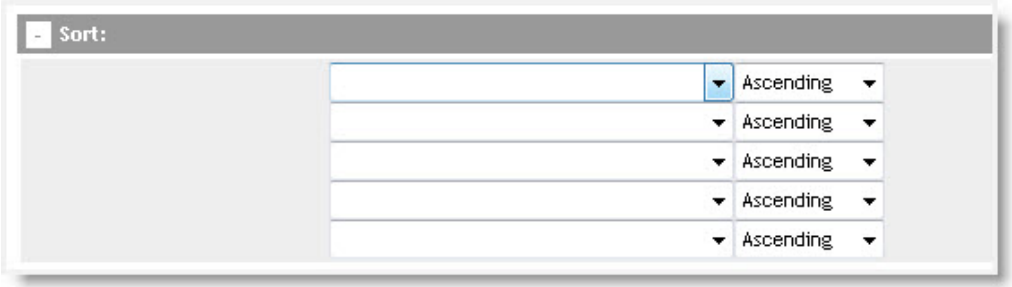
5.2.1.5 Sort

You can define the default sort order used for the search results. Each row in a sort criterion contains the following options:

- **Sort Field:** Select a field from the left drop-down box. You will sort on this field.
- **Order:** Select ascending or descending from the right drop-down box.

You can create a nested sort order by selecting fields in several drop-down boxes.

Sort options



5.2.1.6 Other

In the Other section, you can associate the search with **Keywords** or **Notes** by entering information in the respective text boxes. You can use this information to locate searches in the Search List by filtering on keywords.

Other section

5.2.2 Using Pop-up Pickers

You may have the option to select values from a pop-up picker when you choose certain fields or operators in the Conditions section. For example, pop-ups will be available when you select the following operators:

- Any of these
- None of these
- All of these (only for multiple object fields)
- Not all of these (only for multiple object fields)

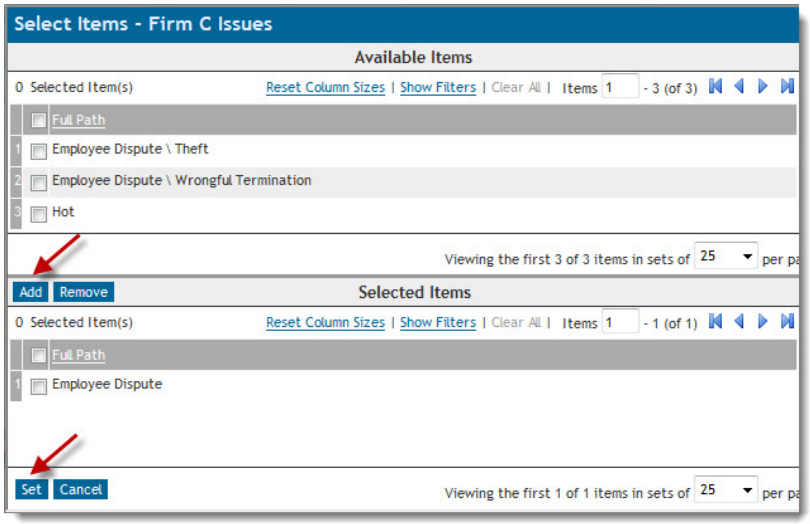
See Creating or Editing a Saved Search on page 28, or Search Conditions on page 23. For information about setting batch conditions, see Batch Fields as Search Conditions on page 42.

5.2.2.1 Select Items Pop-up Picker

Use the following general steps to select items in the picker:

1. Navigate to the Save Search form or use the Search Conditions feature.
2. Select a **Field** option for a condition.
3. To display the picker, click the ellipsis in the **Value** box.

   Pop-up picker example


Select Items - Firm C Issues
Available Items
0 Selected Item(s)
Reset Column Sizes | Show Filters | Clear All | Items 1 - 3 (of 3)
Full Path
1 Employee Dispute \ Theft
2 Employee Dispute \ Wrongful Termination
3 Hot
Viewing the first 3 of 3 items in sets of 25
Add
Remove
Selected Items
0 Selected Item(s)
Reset Column Sizes | Show Filters | Clear All | Items 1 - 1 (of 1)
Full Path
1 Employee Dispute
Set
Cancel
Viewing the first 1 of 1 items in sets of 25

4. Select one or more items in the Available Items list. A checkmark indicates an item is selected.
5. Click **Add**. The items are displayed in the Selected Items list.

> ***Note:*** *To remove an item from this list, select it and click* ***Remove****. The item is displayed in the Available Items list.*

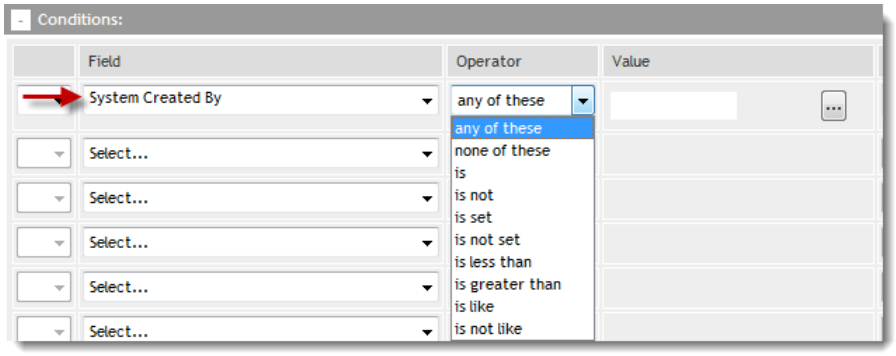
6. Click **Set**. The items are added to the **Value** box in the search form.

5.2.2.2 System User Fields

System user fields include the System Created By and System Last Modified By fields, which you can use in search conditions.

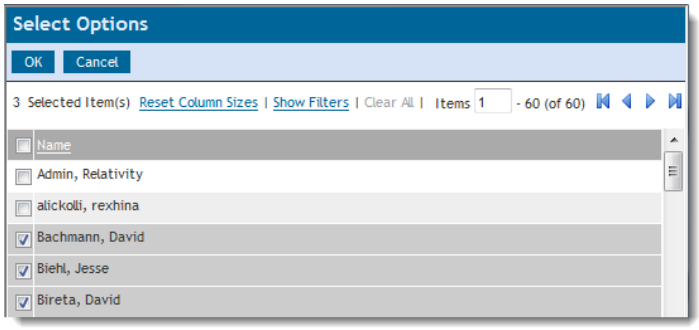
1. Navigate to the Save Search form or use the Search Conditions feature.
2. Select a system user in the **Field** option for a condition.

System User fields as a condition



3. Select an operator, and perform one of the following tasks:
   - If you selected **any of these** or **none of these**, click the ellipsis in the **Value** box to display the Select Options pop-up. Choose one or more user names, and click **OK**.

     Select Options pop-up

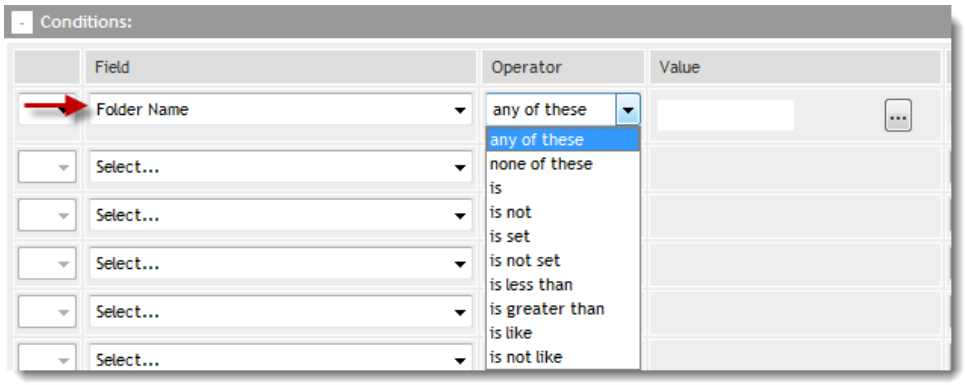
   - Enter the user name in the textbox.
4. Define any additional search criteria as needed.

5.2.2.3 Folder Name Field

You can select Folder Name as a field in a search condition to create more flexible queries than using the Scope section of the Saved Search form. You can combine conditions containing the Folder Name and other fields with AND or OR operators refining your search criteria.

1. Navigate to the Save Search form or use the Search Conditions feature.
2. Select **Folder Name** in the **Field** option for a condition.

Folder Name as a condition



3. Select an operator, and perform one of the following tasks:
   - If you selected **any of these** or **none of these**, click the ellipsis in the **Value** box to display Select Folder pop-up. Choose one or more folders, and click **OK**.

     Select Folder pop-up

   - Enter the folder name in the textbox.
4. Define any additional search criteria as needed.

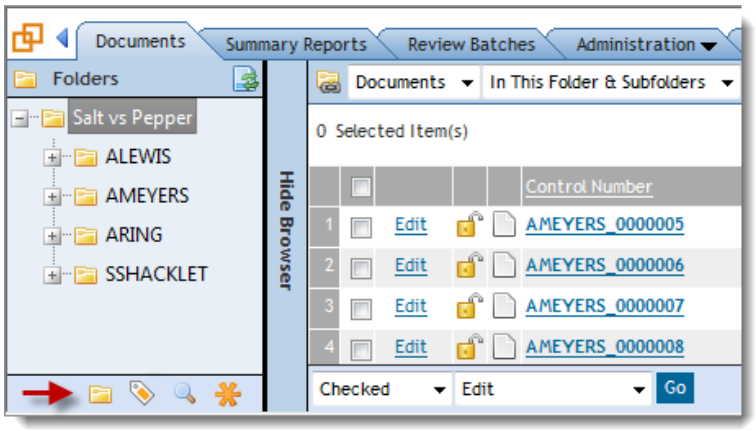
5.3 Saving Searches on the Documents Tab

On the Documents tab, you can use the **Save as Search** link to save a search based on the criteria that you have already set for filtering, Keyword searches, dtSearches, or Analytics. You can enter a unique name for the search, select an owner, and choose a folder for it. Relativity also saves any settings that you have selected for the view, sort order, or other features that control how your results are displayed. After you save your search, it will be available in the Saved Searches Browser, and you can modify it using the same options available for saved searches. See Creating or Editing a Saved Search on page 28.

Note: *To use the* ***Save as Search*** *link, you must have add permissions for* ***Search****, and access to the* ***Saved Searches Browser*** *assigned to you through the Security page. For more information, see the Relativity Admin Manual.*

1. Navigate to the Documents tab.
2. (Optional) In the **Browser** menu, select the **Folders**, **Field Tree**, or **Clusters** option. The item list for the selected browser is displayed.

Browser menu options



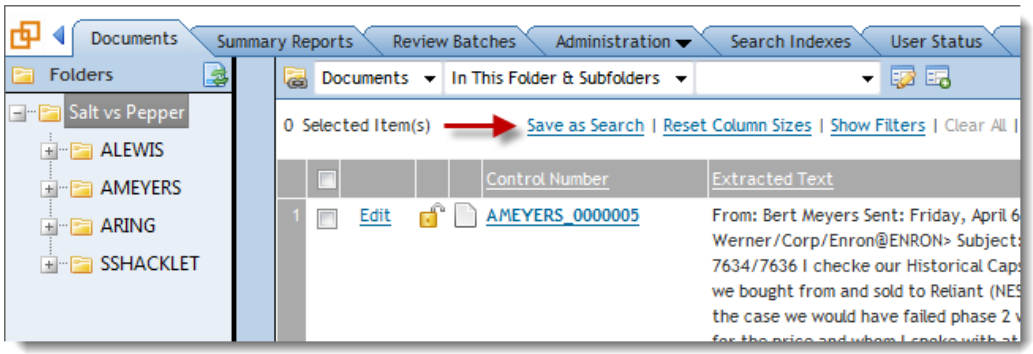
3. Filter on the documents in the list or select a keyword or other search option. To set search criteria, see the specific instructions for running Keyword searches, dtSearches, Analytics, or filters. Your search results will be displayed in the item list on the Documents tab.

   Any folder, tag, or cluster selected in the browser will be included as a condition when the search is saved. The currently displayed columns and sort order will also be saved.

   Note: *If you select an option in the Include Related Documents drop-down, and also set the filters, you will not be able to save this search with the* ***Save as Search*** *link. You can the set Include Related Documents drop-down to blank or clear all filters, and then use this link to save the search.*

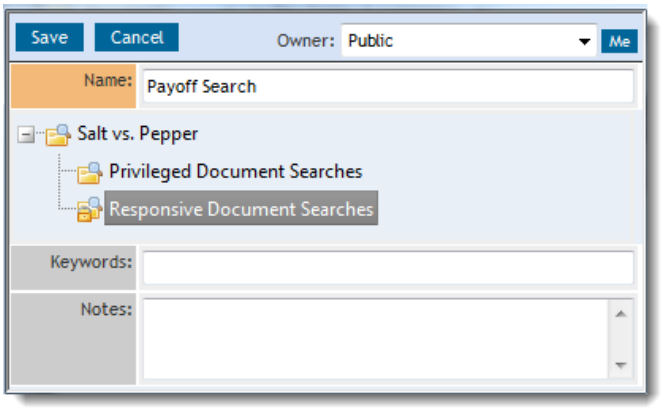
4. Click the **Save as Search** link.

Saved as Search link



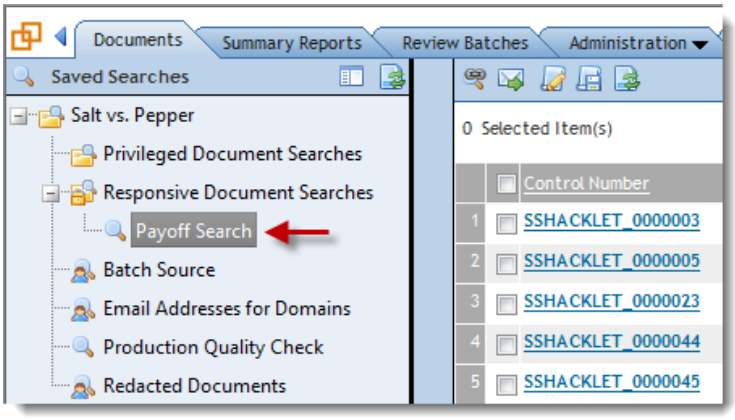
5. Select or enter the following information:
    - **Owner:** Select **Public** to make the search available to all users or choose a specific user from the list. Click **Me** to select your name from the list, making the search private. (Users must have the appropriate privileges to view searches.) See Controlling the Visibility of Saved Searches on page 38.
    - **Name:** Enter a title for the search. The title will be displayed in the Saved Searches browser.
    - **Folder List:** Click the **Plus** button to expand the folders in the list. Highlight the folder where you want to add the search.
    - Enter **Keywords** or **Notes** in the respective text boxes. You can use this information to locate searches in the Search List by filtering on keywords.

    Options for saving a search

6. Click **Save**. Your search criteria are saved and the search is added to the Saved Searches browser. You can click the **Saved Searches** icon to display this browser.

    New search in Saved Searches browser

To update the search, you follow the same steps as those used to edit a saved search. Right-click on the search in the Saved Searches browser, and click **Edit**. The Saved Search form is pre-populated with information used in your search.

5.4 Controlling the Visibility of Saved Searches

On the Saved Search form, you can control the visibility of a search by setting the **Owner** option. New searches are private by default, making them visible only to you and Relativity Administrators. In addition to **Owner** access, users must have permissions to the **Saved Searches Browser** and at least view permissions for **Search** on the Security page. For information about security, see the Relativity Admin Manual.

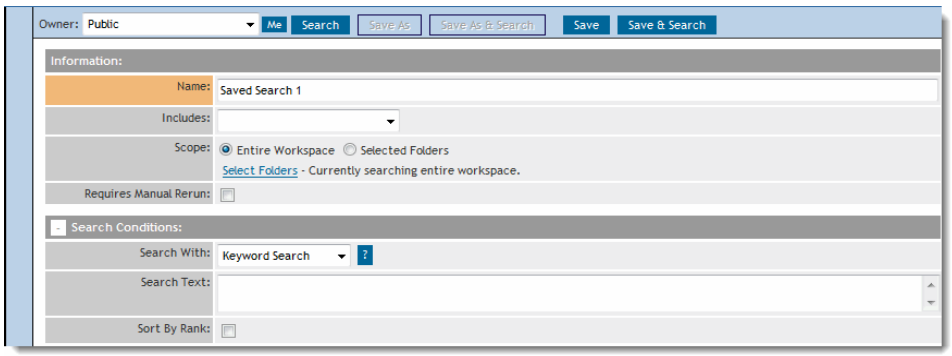
You can change the visibility of a search by selecting one of these options in the **Owner** drop-down menu:

- **Public:** Makes the search available to all users with the appropriate permissions.

  Note: *You can configure Relativity to make your saved searches public by default. When you create a search, the* ***Owner*** *box will display Public. In* ***My Settings****, select* ***Yes*** *in the option* ***Advanced Search Public by Default****. For more information, see the Relativity User Manual.*

- **User Name:** Select a specific user from the drop-down menu. The search will be visible only to that user and Relativity Administrators.

  Saved Search form

- **Me Button:** Click this button to reset the visibility on the search to private. Your name will be displayed in the **Owner** box.

5.5 Defining Criteria for Saved Searches

You define the criteria used for Saved Searches in the Conditions section of the Saved Search form. You can build complex queries using a combination of fields and operators that are set to required values. In this section, you will find information about the operators available for building these queries, as well as specific options for searching batches and developing combined searches. For information about building queries, see Creating or Editing a Saved Search on page 28.

5.5.1 Operators

When defining search criteria in the Conditions section of a Saved Search form, you will use operators to determine how a field is queried for the value that you selected or entered. The field type determines which of the following operators are available for a search criterion:

- Fixed Length, Long, or Extracted Text Operators on page 39
- Whole Number, Decimal, and Currency Operators on page 40
- User Operators on page 40
- Date Operators on page 41
- Yes or No on page 41
- Single and Multiple Choice Field Operators on page 41

5.5.1.1 Fixed Length, Long, or Extracted Text Operators

The following table lists operators available for fixed length, long, and extracted text field types.

Operator	Returns Documents Where...
Is like	The field contains all or part of the entered term. Blank values are filtered out, and search values can be enclosed in double quotation marks. A partial match does not require a wildcard (*). Relativity returns an OR operator between terms when a condition uses the "Is like" operator, and the terms are separated by a carriage return into multiple lines, or they are separated by a comma within a single line. For example, Relativity interprets a query as "Field is like Term 1 or Field is like Term 2 or Field is like Term 3". **Note:** For performance reasons, kCura recommends using the "Contains" operator rather than building queries with single or multiple uses of the "Is like" operator. See FAQs for Contains and Is Like Operators on page 40.
Is not like	The field does not contain the entered term. You can use wildcards (*) with this operator. The comments about the "Is like" operator also apply to "Is not like".
Is	The field value equals any of the entered items. Multiple values can be separated by a comma or carriage return. Blank values are filtered out, and search values can be enclosed in double quotation marks.
Is not	The field value does not equal the entered term.
Is set	The field is not empty.
Is not set	The field is empty.
Is less than	The field value is less than the entered term.
Is greater than	The field value is greater than the entered term.
Contains	The field includes the entered term. This operator is available for long text and fixed length text fields included in the full text index. Blank values are filtered out, and search values can be enclosed in double quotation marks. You can also use the AND/OR operators, and add wildcards (*) to the end of the search.Relativity returns an OR operator between terms when a condition uses the "Contains" operator, and the terms are separated by a comma. (You can also use the OR operator to separate search terms.) For example, Relativity interprets these queries as "Field is like Term 1 or Field is like Term 2 or Field is like Term 3", and "Field contains Term 1 or Term 2 or Term 3" respectively.Relativity returns an AND operator between terms when a condition uses the "Contains" operator, and the terms are separated by a carriage return into multiple lines.
Does not contain	The field does not contain the entered term. This operator is available for long text and fixed length text fields included in the full text index. Blank values are filtered out, and search values can be enclosed in double quotation marks.

FAQs for Contains and Is Like Operators

You can improve your searches by understanding the differences between the "Contains" and "Is like" operators as outlined in the following FAQs.

- Why do searches using the "Is like" operator tend to run slowly?

  The "Is like" operator can slow the performance of your system because it queries every document for the field specified in the condition. For performance reasons, kCura does not recommend building queries with single or multiple uses of the "Is like" operator. Instead, you can use the "Contains" operator, which improves performance by querying only the fields in the full text index.
- Are there any special requirements for using the "Contains" operator?

  Yes, the full text index must include the field that you want to search with the "Contains" operator.
- How does query execution differ for searches with the "Contains" and "Is like" operators?

  The "Contains" operator queries the SQL full text catalog, while the "Is like" operator queries the database table inside the catalog. The "Is like" operator prevents other queries from editing the table until it completes, which can negatively affect performance.
- Why are different search results returned by queries using the "Contains" versus "Is like" operators?

  The difference in result sets is caused by the way that SQL interprets queries using these operators. An "Is like" statement appends a wildcard to the front of each query, which sometimes causes it to return more items than a query with the "Contains" operator. You will need to evaluate these additional items to determine if they are actually part of your expected result set, or if they represent false hits for the items that you want to return.
- Is there any way to enhance the performance of queries using the "Is like" operator?

  Yes, you can make queries that use the "Is like" operator more efficient by creating an SQL index on the table column referenced by the query. The query can point to this index, and avoid accessing the table. For more information, contact your System Administrator.
- How can I use the "Contains" operator to facilitate document reviews?

  You can use the "Contains" operator to search fields in email headers for email addresses and other pertinent header information. To perform these searches, the Author, TO, CC, and BCC fields in email headers must be added to the full text index.

5.5.1.2 Whole Number, Decimal, and Currency Operators

The following table lists operators available for whole number, decimal, and currency field types.

Operator	Returns Documents Where...
Is	The entered number is equal to the field value.
Is not	The entered number is not equal to the field value.
Is set	The field is not empty.
Is not set	The field is empty.
Is less than	The field value is less than the entered number.
Is greater than	The field value is greater than the entered number.

5.5.1.3 User Operators

The following table lists operators available for user field types.

Operator	Returns Documents Where...
Is logged in user	The logged in user is equal to the field value.

Operator	Returns Documents Where...
Any of these	Any of the selected users match the field value.
None of these	The selected users do not match the field value.
Is set	The field is not empty.
Is not set	The field is empty.

5.5.1.4 Date Operators

The following table lists operators available for date field types.

Operator	Returns Documents Where...
Is	The entered date is equal to the field value.
Is not	The entered date is not equal to the field value.
Is set	The field is not empty.
Is not set	The field is empty.
Is before	The field value is before the entered date.
Is before or on	The field value is before or on the entered date. (This operator adds 1 minute to the date and time specified for the search. For example, if you search on 5/11/2012 1:59 PM, your results will also include items with the date and time of 5/11/2012 2:00 PM.)
Is after	The field value is after the entered date.
Is after or on	The field value is on or after the entered date.
Between	The field value is between the two entered dates.
Is in	The field value is within the selected range.

5.5.1.5 Yes or No

The following table lists operators available for Yes/No field types.

Operator	Returns Documents Where...
Is	The selected value (Yes or No) is equal to the field value.
Is not	The selected value (Yes or No) is not equal to the field value.
Is set	The field is not empty.
Is not set	The field is empty.

5.5.1.6 Single and Multiple Choice Field Operators

The following table lists operators available for single and multiple choice field types.

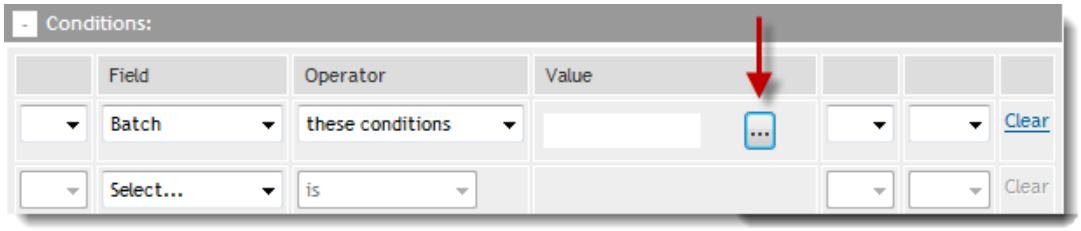
Operator	Returns Documents Where...
Any of these	Any of the selected choices are present in the field.
None of these	None of the selected choices is present in the field.
All of these	All of the selected choices are present in the field.
Not all of these	The selected choices are not present in the field.
Is set	The field is not empty.
Is not set	The field is empty.

5.5.2 Batch Fields as Search Conditions

Relativity includes several fields related to batching that you can use as conditions for searching across batch sets.

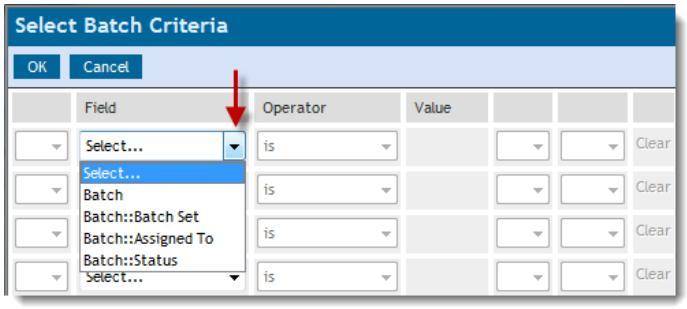
1. Select **Batch** in the Field drop-down.

Batch field



2. Choose the **Operator** that you want to use.
3. Click the ellipsis [...] in the **Value** column to display the Select Batch Criteria Pop-up.

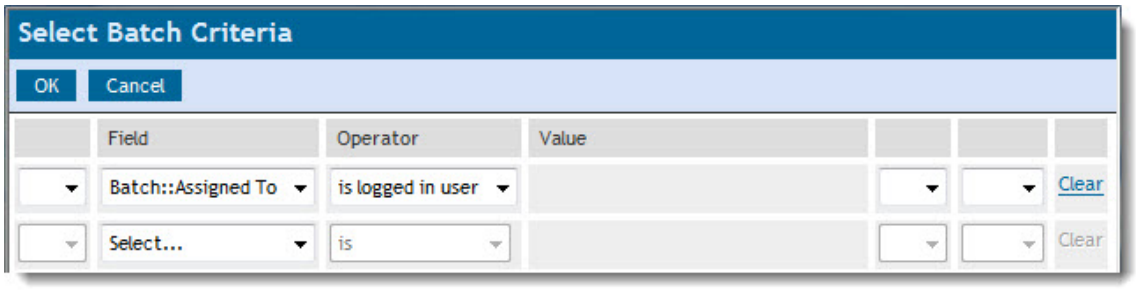
Select Batch Criteria pop-up



4. Select one of the following batch related fields:
   - Batch
   - Batch::Batch Set
   - Batch::Assigned To
   - Batch::Status

   As illustrated below, you can use the Assigned To field to search for batches set to a specific user.

Batch Criteria selector



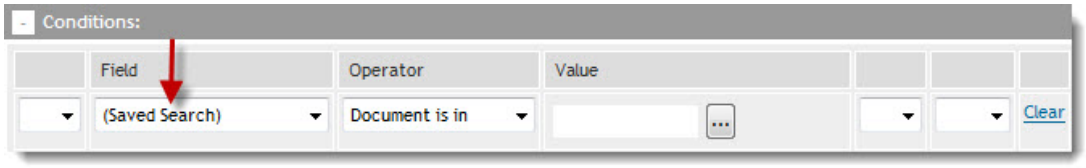
See Operators on page 38 for more information.

5.5.3 Using Saved Searches as Conditions (Combined Searches)

You can created combined searches by selecting previously created saved searches as Field conditions.

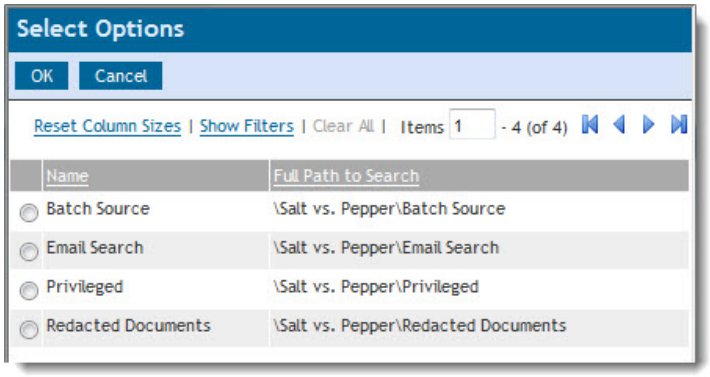
1. In the Conditions section, select **(Saved Search)** from the top of this list in the **Field** drop-down box.

Saved Search condition



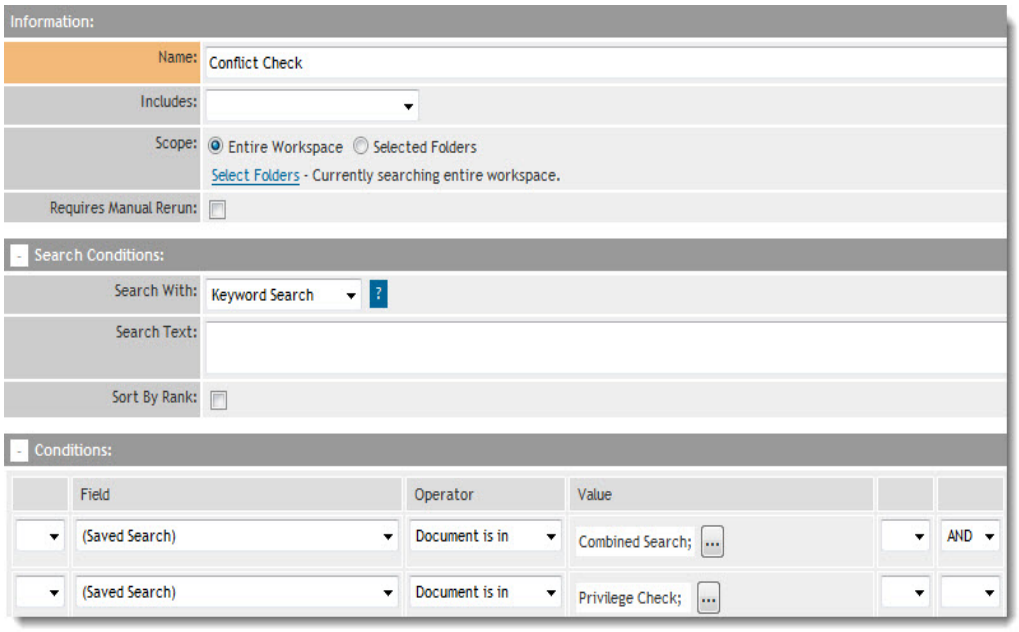
2. Select an option in the **Operator** drop-down.
3. Click the ellipsis [...] in the **Value** column to display a pop-up.

Saved search list



4. Select a saved search on the pop-up and click **OK**. As illustrated below, you can use multiple save searches as Field conditions. You may affect search performance by including multiple searches in a query.

Combined search



Note: *Relativity displays an error message if you attempt to delete a saved search referenced by another search or by the Document view.*

5.5.3.1 Preventing Circular References

Relativity prevents you from creating recursive searches when you combine multiple searches as conditions in a query. For example, you might create a combined search using Saved Searches 1, 2, and 3 as follows:

- Saved Search 2 uses Saved Search 1 as a Field condition.
- Saved Search 3 uses Saved Search 2 as a Field condition.

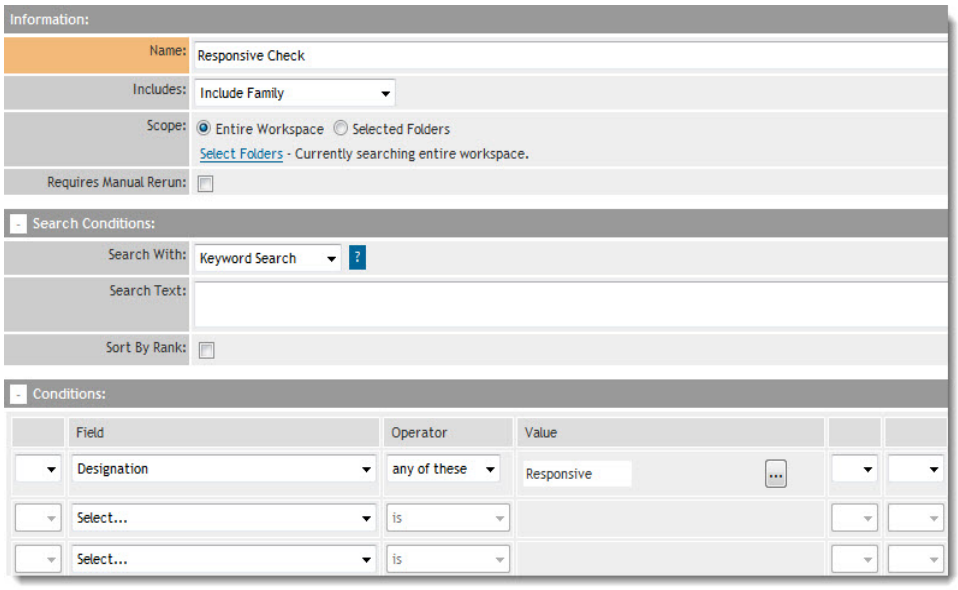
When you edit Saved Search 1, you will not be able to select Saved Search 2 or Saved Search 3 as Field conditions. Relativity prevents you from creating a circular reference by not listing these searches in the pop-up displayed when you click ellipsis in the **Value** column.

5.5.3.2 Including Related Items in Combined Searches

You can combine saved searches to check for conflicts within related item groups. For example, a review manager may use a combined search for quality control when preparing to produce responsive documents for a case. You can use the following steps to confirm that a search for responsive documents does not include any privileged documents.

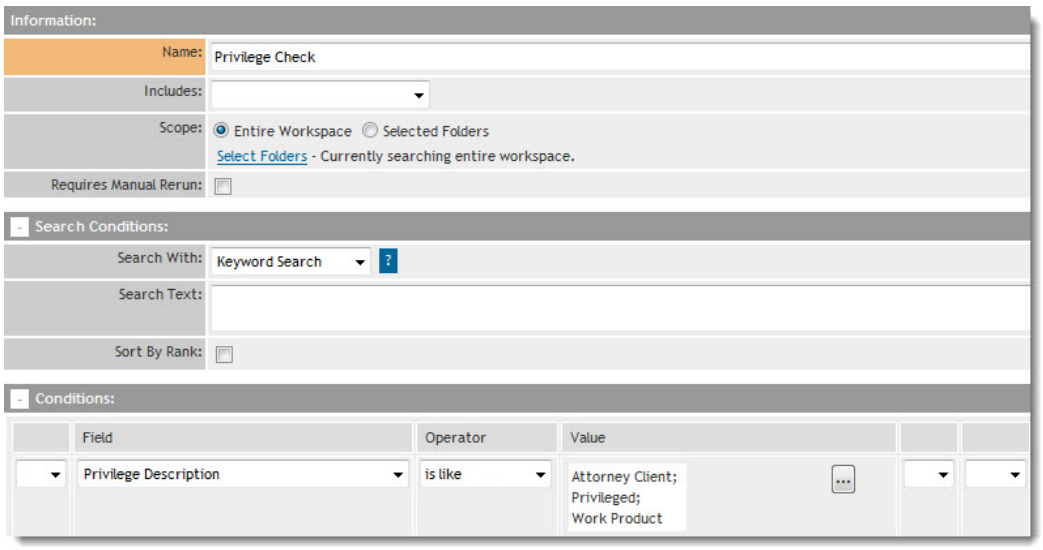
1. Create a saved search called **Responsive Check** that uses the **Includes Family** option, and sets a condition on a field such as Designation to **Responsive**. This search specifies production criteria that return only responsive documents.

Production eligible search



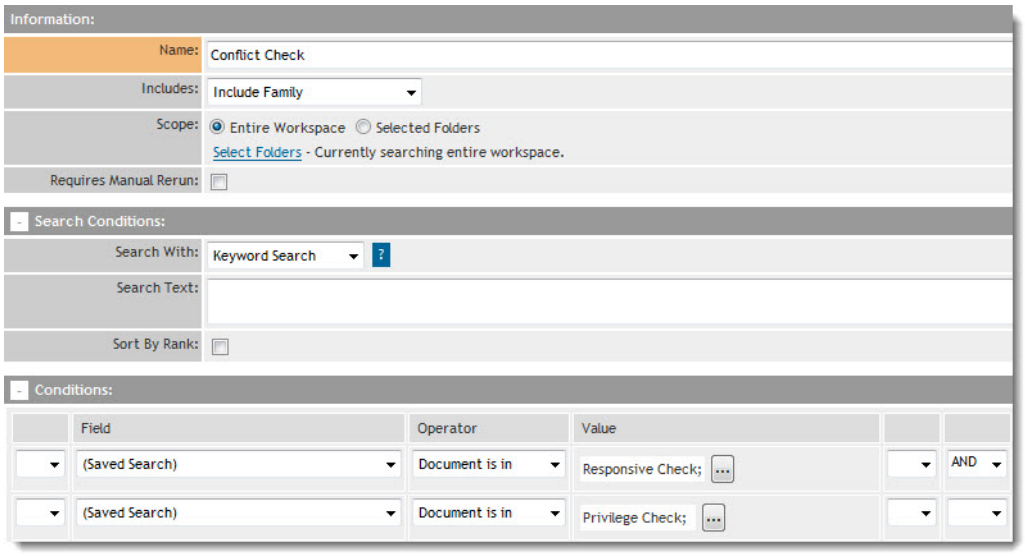
2. Create a second saved search called **Privilege Check** that uses the **Includes Family** option, and sets a condition on a field such as Privilege Description to **Privileged**, **Attorney Client**, and so on. This search is used for evaluation purposes.

Privilege check search



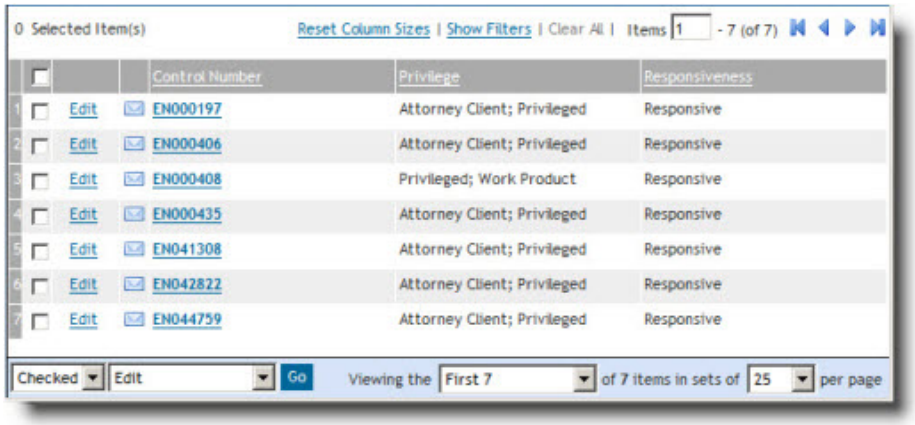
3. Create a combined search called **Conflict Check** that uses the **Includes Family** option, and sets conditions using the **Responsive Check** and **Privilege Check** searches. This quality control search determines if any privileged documents are included in the production-eligible saved search.

Quality control search



In this example, the search results included seven privileged documents in the production eligible search.

Quality control search results


0 Selected Item(s)
Reset Column Sizes | Show Filters | Clear All | Items 1 - 7 (of 7)
Control Number
Privilege
Responsiveness
Edit EN000197 Attorney Client; Privileged Responsive
Edit EN000406 Attorney Client; Privileged Responsive
Edit EN000408 Privileged; Work Product Responsive
Edit EN000435 Attorney Client; Privileged Responsive
Edit EN041308 Attorney Client; Privileged Responsive
Edit EN042822 Attorney Client; Privileged Responsive
Edit EN044759 Attorney Client; Privileged Responsive
Checked
Edit
Go
Viewing the First 7 of 7 items in sets of 25 per page

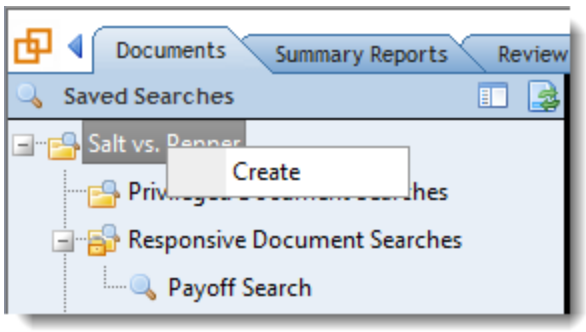
5.6 Organizing Saved Searches in Folders

You can organize saved searches by adding them to securable folders that you create and manage in the Saved Searches browser. To work with search folders, you must have the appropriate permissions for **Search Folder**, **Search**, and the **Saved Searches Browser** on the Security page. For information, see the Relativity Admin Manual.

5.6.1 Adding Subfolders to the Root

In the Search Folder Tree, right-click on the root folder to add subfolders to the browser. Click **Create** to add a new folder. To update the folder name, right-click on the folder, and click **Rename**.

Right-click menu for root folder

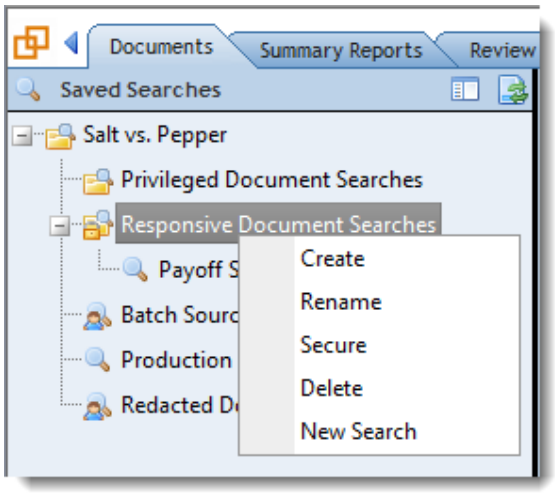


5.6.2 Managing Subfolders

Right-click on a folder under the root to display the following menu options:

- **Create:** Adds a subfolder to the highlighted folder.
- **Rename:** Makes the folder name editable. Enter new text for the name.
- **Secure:** This option displays a security page so that you can override the security inherited from the workspace, or parent folder. For more information about security, see the Relativity Admin Manual.
- **Delete:** Permanently removes all the searches and subfolders that folder contains from the database.
- **New Search:** Displays the Saved Search form. See Creating or Editing a Saved Search on page 28.

  Right-click menu for subfolders



5.6.3 Adding Existing Searches to Folders

To add existing searches to a folder, drag and drop the search to it. Click **OK** on the confirmation message.

> ***Note:*** *When you move a search, it will inherit the security from the parent folder. You may want to check the security on a folder before moving a search to it.*

5.7 Running Out-of-Date Saved Searches

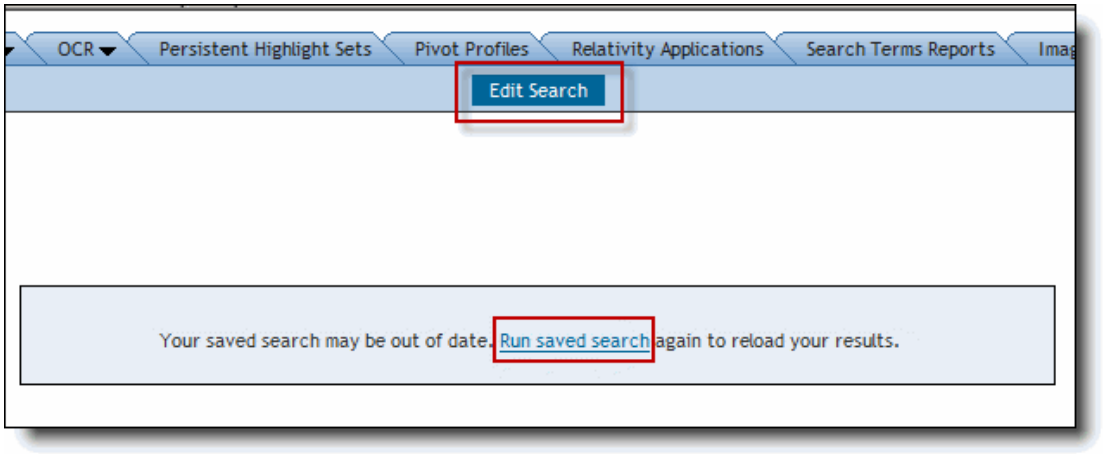
You may need to rerun a saved search when you return to it after navigating to other features in Relativity. Instead of seeing your search results, you will see a message indicating that your search is out of date.

> ***Note:*** *To enable the* ***Run saved search*** *feature, select the* ***Require Manual Rerun*** *option in the Information section of the Saved Search form. See Creating or Editing a Saved Search on page 28.*

Perform one of these tasks:

- Click **Run saved search** to reload your search results. You can also click on the saved search in the browser to rerun the search.
- Click **Edit Search** to display the Saved Search form where you modify the search settings. See Creating or Editing a Saved Search on page 28.

Run out of date search


OCR
Persistent Highlight Sets
Pivot Profiles
Relativity Applications
Search Terms Reports
Edit Search
Your saved search may be out of date. Run saved search again to reload your results.

If you edit an item returned in your saved search, you will also need to rerun it. You must rerun the search even when the edited item still meets the search criteria, and the number of documents returned is unchanged.

6 DTSEARCHES

In Relativity, the dtSearch engine provides advanced search functionality such as proximity, stemming, and fuzzy searches. It also supports the use of Boolean operators, custom noise word lists, and other basic searching features available in keyword searches.

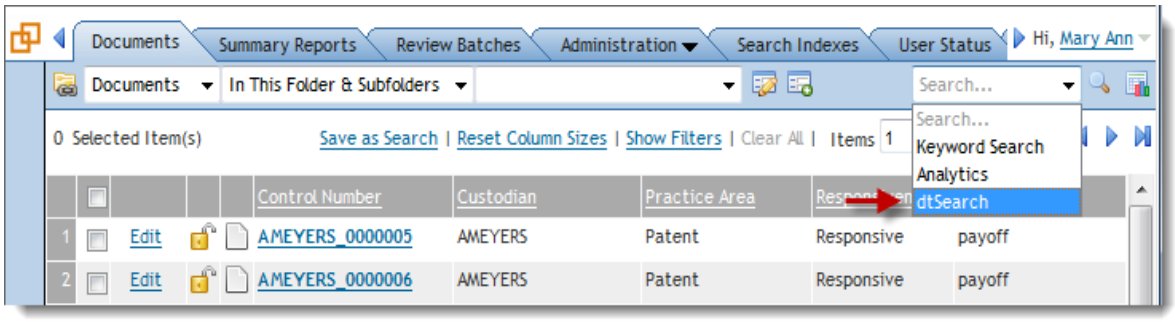
Your Relativity Administrator can build custom dtSearch indexes for a specific subset of documents or document fields available in a workspace. A dtSearch index is created with a saved search, and it indexes only those fields included in the search. Each index can also be assigned a custom name indicative of the document search set used to create it. The dtSearch engine generates fully managed indexes that a Relativity Administrator must update when the data sets used to build them are modified by the addition, modification, or deletion of documents. Consult your Relativity Administrator for additional information about custom dtSearch indexes.

6.1 Running a dtSearch

Use the following steps to run a dtSearch. To access Searching online help, click the **Question Mark** icon displayed next to the **Clear** option.

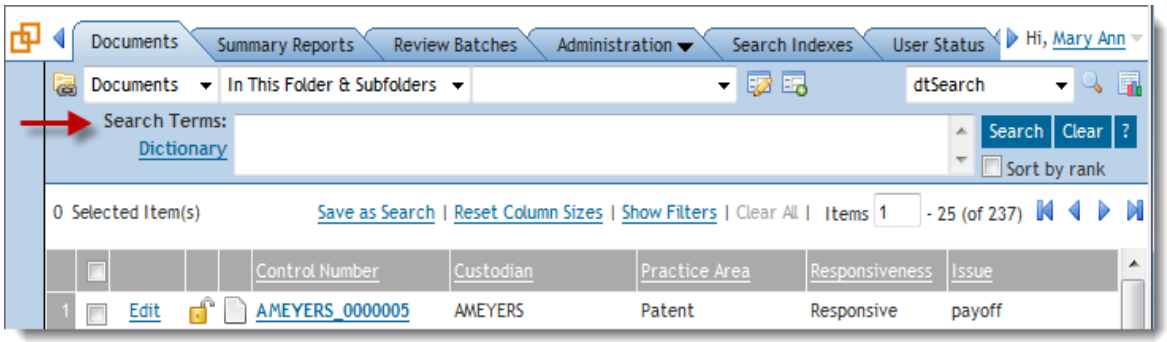
1. On the Documents tab, click the **Search With** drop-down, and select a dtSearch from the list. The available dtSearches vary by workspace, so you may want to consult your Relativity Administrator for additional information.

Search With box



2. (Optional) Click **Dictionary** to determine the total occurrences of a term in the dtSearch index. See Running a Dictionary Search on page 50.

Search Terms box



3. Enter terms for the search in the in the **Search Terms** box. You can also click **Clear** to remove the current search terms from the box.

   The following table lists search string examples with their expected results. For more information, see Using dtSearch Syntax Options on page 53.

Search String	Returns Documents With...
apple pear	The exact phrase apple pear
"apple pear"	The exact phrase apple pear
apple AND pear	The word apple and the word pear
apple OR pear	Either apple or pear
apple W/5 pear	Apple appears within 5 words of pear
apple PRE/5 pear	Apple appears within 5 words before pear **Note:** Relativity does not use the POST operator. However, you can mimic this functionality by reversing the order of the terms, and using the PRE operator.
apple NOT W/5 pear	Apple does not appear within 5 words of pear
apple AND NOT pear	Apple appears but pear does not
apple W/5 xfirstword	Apple appears in the first 5 words of the document
apple w/5 xlastword	Apple appears in the last 5 words of the document

4. (Optional) To display fields for search conditions, click the **Search Conditions** icon located next to the **Search With** drop-down. See Search Conditions on page 23.
5. (Optional) Click **Sort by rank** to order the documents in the result set by relevance. The most relevant documents are displayed at the top of the list.
6. Click **Search**.

6.2 Running a Dictionary Search

When you run a dtSearch, you can use the **Dictionary Search** option to query the index for a term, and display the total occurrences and number of documents that contain it. The results displayed on Dictionary Search dialog box include the following columns:

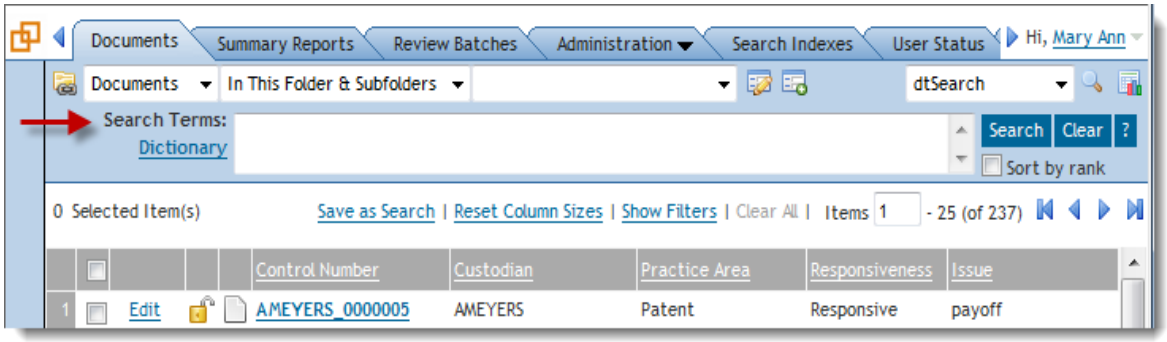
- **Keyword:** The word contained in the index. If you use fuzziness or stemming in your search, this column displays any variations of the term.
- **Total Words:** The number of times that the word appears in the dtSearch index.
- **Total Documents:** The number of documents in the index that contain the word.

The Dictionary Search will only return the first 2,000 items in the result set. If your search has more than 2000 hits, it will display a message indicating that only 2,000 items are returned.

Use the following instructions to run a dictionary search:

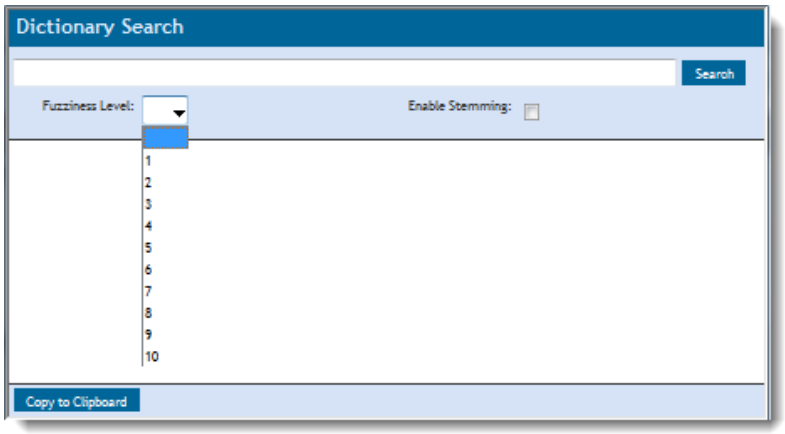
1. In the **Search With** drop-down, select a dtSearch. See Running a dtSearch on page 49.

Dictionary link



2. Click **Dictionary** to determine the total occurrences of a term in the dtSearch index.

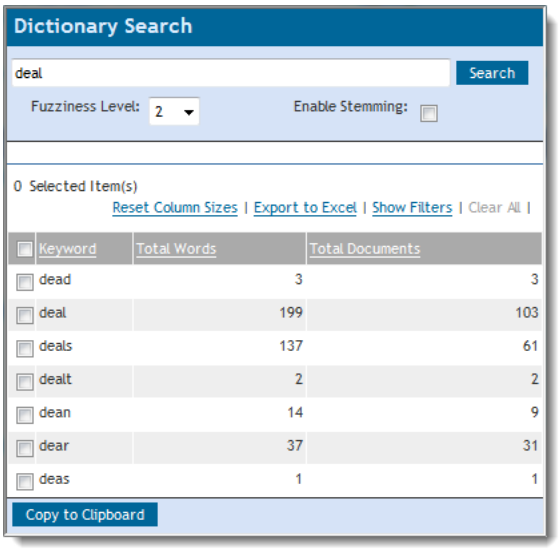
Dictionary Search dialog box



3. Enter a search term in the textbox. You can enter variations of a search term, as well as the wildcard (*), stemming (~), or fuzzy searching (%) operators.
4. (Optional) Set one of the following search operators:
   - **Fuzziness Level:** Select a value from 1 to 10 to determine the degree of variation in the terms returned. A larger number returns terms with more variation. This option is independent of the fuzziness (%) character that you can enter in the textbox on the Dictionary Search dialog. See Fuzzy Searching on page 56.
   - **Enable Stemming:** Select this option to return grammatical variations of a word. For example, a search on "apply" will return "applying", "applies" and "applied". This option is independent of the stemming (~) character that you can enter in the textbox on the Dictionary Search dialog. See Stemming on page 61.

5. Click **Search** to display a list of keywords, and their associated totals.

Dictionary Search results

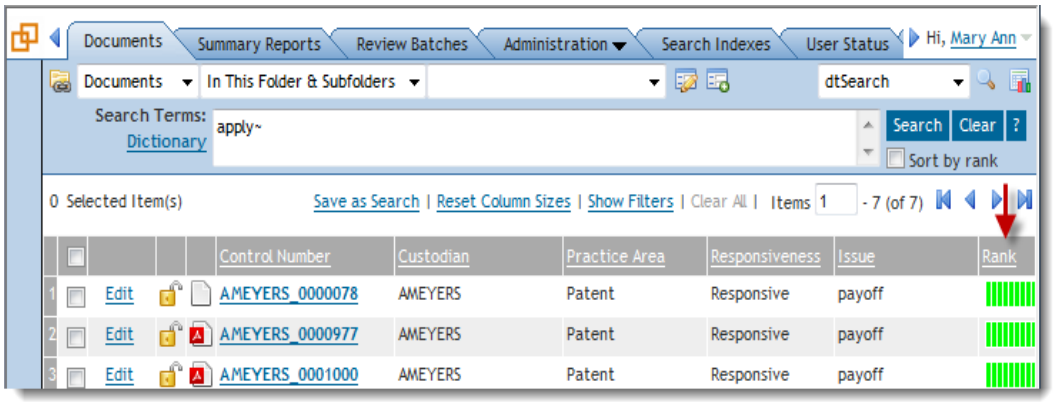


6. Perform any of the following tasks with your search results:
   - **Copy to Clipboard:** Select the checkboxes for the terms that you want to copy, and click **Copy to Clipboard**. On the Documents tab, right-click in the **Search Terms** box, and click **Paste**. The terms will added to the textbox separated by the OR operator.
   - **Sort:** Click a column header to sort in descending or ascending order.
   - **Reset Columns Sizes:** Displays columns with their default widths.
   - **Export to Excel:** Click this link to download an Excel spreadsheet containing the keywords and totals from the dictionary search.
   - **Show Filters** and **Clear All:** See Using Filters on page 8.

6.3 Interpreting Returned Rank

dtSearches return a field called **Rank** for each document in the result set. The **Rank** column is displayed to the right of other columns in the view. It contains all bars (100%) for documents that match the search terms (that is hit on the search criteria).

Rank column in dtSearch results



6.4 Using dtSearch Syntax Options

dtSearch includes special characters and other operators that you can use to define search criteria. The following table summarizes the syntax options that are available for queries run against a dtSearch index.

Special Characters or Operators	Information on Search Functionality
date(), mail(), creditcard()	Auto-Recognition on page 53
ADD, OR, NOT	Boolean Connectors on page 54
xfirstword, xlastword	Built-In Search Words on page 55
%	Fuzzy Searching on page 56
Noise Words, Alphabet	Noise Words and the Alphabet File on page 58
~~	Numeric Range Searching on page 59
##	Regular Expressions on page 60
~	Stemming on page 61
:	Variable Term Weighting on page 62
?, = , *	Wildcards on page 62
W/N	W/N Connector on page 63
" "	Words and Phrase on page 64

6.4.1 Auto-Recognition

Auto-recognition provides you with the ability to search for various date formats, e-mail addresses, and credit card numbers. However, it can dramatically affect indexing and searching performance. Auto-recognition must be activated before it will be available in your workspace. Contact your Relativity Administrator for more information.

6.4.1.1 Date Recognition

Date recognition searches for strings that appear to be dates. It uses English-language months (including common abbreviations), and numerical formats. For example, these date formats are recognized:

- January 15, 2006
- 15 Jan 06
- 2006/01/15
- 1/15/06
- 1-15-06
- The fifteenth of January, two thousand six

To search for a date, enter a date expression or range between the parentheses in "date()".

6.4.1.2 Email Address Recognition

Email address recognition searches for text with the syntax of a valid email address, such as "sales@example.com". With this feature, you can search for a specific email address regardless of the alphabet settings for "@", ".", or other punctuation in the email address.

You can also use the word listing functions in dtSearch to enumerate all email addresses in a document collection. Wildcard expressions are supported in this function as illustrated below:

- mail(sales@example.com)
- mail(sa*@example.com)

To search for an email address, enter an email address between the parentheses in "mail()".

6.4.1.3 Credit Card Number Recognition

Credit card number recognition searches for any sequence of numbers that matches the syntax for a valid credit card number issued by a major company, such as Visa, MasterCard, and so on. A credit card number is recognized regardless of the pattern of spaces or punctuation embedded in the number as illustrated below:

- 1234-5678-1234-5678
- 1234567812345678
- 1234 5678 1234 5678

Credit card issuers use numerical tests to exclude sequences of numbers that are not valid credit card numbers. Since these tests do not detect all invalid numbers, the feature for credit card number recognition may find additional invalid numbers.

To search for a credit card number, enter a credit card number between the parentheses in "creditcard()", as exemplified in "creditcard(1234*)".

6.4.2 Boolean Connectors

The dtSearch engine supports Boolean operators, including AND, OR, and NOT. You can use these operators to connector multiple phrases or terms in a single search expression.

6.4.2.1 AND Connector

When you use the AND operator to connect expressions, only documents that contain all the expressions in the search string will be returned in the result set. The following search strings illustrate how to use this operator:

- "apple pie AND poached pear" retrieves any documents that contain both phrases.
- "(apple or banana) AND (pear w/5 grape)" retrieves any documents that contain "apple" or "banana" AND contain "pear" within five words of "grape".

6.4.2.2 OR Connector

When you use the OR operator to connect expressions in a search string, documents that contain one or more of these expressions will be returned in the result set. For example, the search string "apple pie or poached pear" will return documents that contain "apple pie", "poached pear", or both phrases.

6.4.2.3 NOT Connector

In a dtSearch, you can use the NOT operator at the beginning of a search expression to negate its meaning, and exclude documents from a result set. For example, the search expression "applesauce and NOT pear" returns documents that contain the word "applesauce", but not those documents that contain both the words "applesauce" and "pear".

NOT Operator as a Stand-Alone

You can use the NOT operator by itself at the beginning of a search expression. For example, the search expression "NOT pear" returns all the documents that do not contain the word "pear". The search expression "NOT (apple w/5 pear)" returns all the documents that do not contain the word "apple" within five words of "pear".

NOT Operator as a Connector

When the NOT operator appears in the middle of a search expression, it must be used in conjunction with either AND or OR. For example, the search expression "apple OR NOT pear" returns all the documents that contain the word "apple" and those that do not contain the word "pear".

Note: *You can also use NOT in a proximity search as illustrated by the NOT W/N (NOT Within N words) connector. See W/N Connector on page 63.*

AND NOT Operator

You can use the AND NOT operator to develop queries for documents that include the first expression but not the second expression. For example, you may want to query for email messages that have Ryan as the author, but do not have Will as the recipient. The following record illustrates these conditions:

Document	OCR	Recipient	Author
AS00001	From: Ryan To: Will	Will	Ryan

You can perform a dtSearch using the search string Ryan AND NOT Will to query for these messages, and return results that does not include document AS00001.

The dtSearch engine combines the text for all fields identified for inclusion in an index into a single pool. A search string using the AND NOT operator will query the index that includes the combine text from all indexed fields, rather than querying the content of individual fields. This behavior ensures consistent result sets when querying with the AND NOT operator.

Note: *A keyword search is an SQL full text search, which queries individual fields. It will not return the same results as a dtSearch when the NOT operator is used to query across multiple fields. See Using the NOT Operator in Keyword Searches on page 19.*

6.4.2.4 Operator Precedence

The precedence or the order of evaluation determines how a group of expressions is evaluated in a query. You can use parentheses to group expressions, and control which ones are evaluated first. For example, the following search strings illustrate how to group expressions:

- (apple and pear) or grape
- apple and (pear or grape)

When a search string does not include parentheses, the order of precedence for a dtSearch evaluates OR then AND expressions. For example, the search string A AND B OR C is evaluated as follows for a dtSearch: **A AND (B OR C)**.

Note: *The order of precedence for a keyword search evaluates AND then OR expressions: (A AND B) OR C.*

When two expressions are connected by W/N, at least one of them must be a single word or phrase, or a group of words and phrases connected by OR as illustrated below:

- (apple and banana) W/10 (pear or grape)
- (apple and banana) W/10 orange tree

6.4.3 Built-In Search Words

dtSearch includes the following two built-in search words:

- **xfirstword:** Marks the beginning of a file.
- **xlastword:** Marks the end of a file.

You can use these terms to limit a search to the beginning or end of a file. For example, "apple W/10 xlastword" searches for "apple" within 10 words of the end of a document.

6.4.4 Fuzzy Searching

Using the dtSearch engine, you can perform fuzzy searches, which return documents containing spelling variations of a specified term. You may want to use fuzzy searching when querying documents that contain misspelled terms, typographical errors, or have been scanned with Optical Character Recognition (OCR).

The percent sign (%) is the character used for fuzzy searches. The number of the % indicates how many characters in the search term will be ignored by the dtSearch engine when it runs the query. The position of the % indicates the number of characters from the beginning of the term that must match exactly with words in the result set. The following search strings illustrate how this character is used:

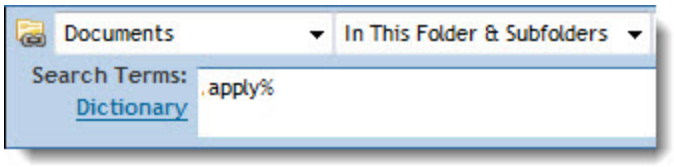
- "app%ly" indicates that a matching word must begin with "app", and differ from "apply" by only one character.
- "a%%pply" indicates that a matching word must begin with "a", and differ from "apply" by only two characters.

6.4.4.1 Using the Fuzziness Operator and Fuzziness Level Option

In Relativity, you have can use the fuzziness character (%) or the **Fuzziness Level** drop-down to perform fuzzy searches. The availability of these search options depends on the location where you are running a dtSearch:

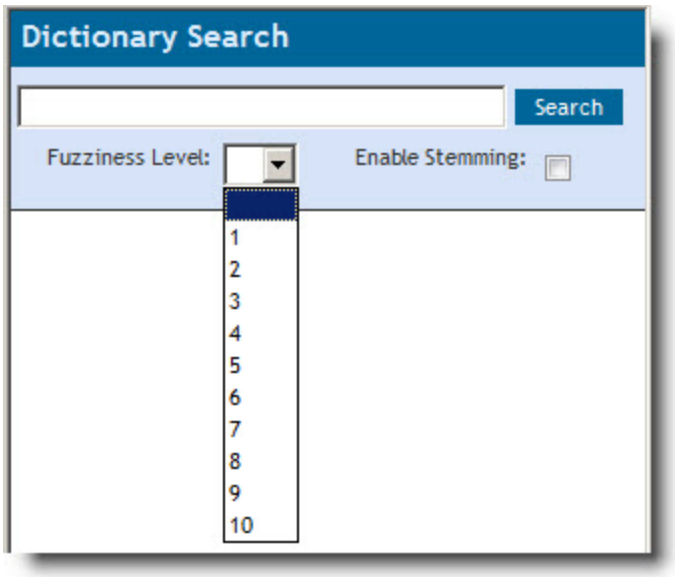
- **Documents tab:** When you select a dtSearch in the **Search With** option, you can use the fuzziness character (%). See Running a dtSearch on page 49.

Search Terms box on Documents tab



- **Dictionary Search:** When you click the **Dictionary** link, you can use the fuzziness character (%) and the **Fuzziness Level** drop-down on the Dictionary Search dialog. See Running a Dictionary Search on page 50.

Dictionary Search dialog box

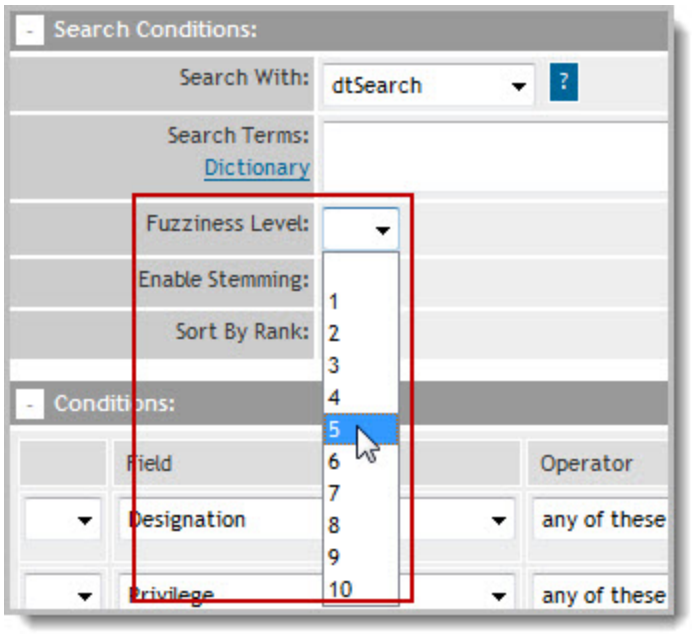


In the **Fuzziness Level** drop-down, you can select a value from 1 to 10, which applies to all terms in the textbox. Larger numbers return terms with more variation. Recommended values are between 1 and 3 for moderate error tolerance. The following table describes the expected results for sample settings.

Fuzziness Level	Description of Search Results
Blank	Only returns the entered term.
1	Returns slight variations of the entered term.
4	Returns multiple variations of the entered term.

- **Saved Search:** When you create a saved search, you can use the fuzziness operator (%) and the **Fuzziness Level** drop-down in the Search Conditions section of the form. The **Fuzziness Level** drop-down in a saved search uses the same settings as described above. See Creating or Editing a Saved Search on page 28.

Search Conditions section of Saved Search form



Note: *The* ***Fuzziness Level*** *drop-down is independent of the fuzziness (%) character that you can enter in the textbox. A search for "appl%" without a* ***Fuzziness Level*** *setting may return documents containing "apple" or "apply", since these terms have the stem "appl" and differ by one character. In contract, a search for "apple" with a* ***Fuzziness Level*** *of 3 may return "app", "applied", "apply", and so on, since these terms have the stem "appl" and differ by up to 3 characters.*

6.4.5 Noise Words and the Alphabet File

The dtSearch engine references a default list of noise words and an alphabet file when it creates a new index. The noise words are not included in a dtSearch index to improve query performance and prevent unnecessary index growth. These commonly used words are ignored when you run a query. The alphabet file determines how single characters and spaces are handled in a query. This section describes how a dtSearch uses noise words and the alphabet file.

Note: *If your dtSearches are not returning the expected results, you may want to consult your Relativity Administrator about updating the noise word list or alphabet file.*

6.4.5.1 Alphabet File

The dtSearch engine uses an alphabet file to identify characters are treated as text, characters that cause word breaks, and characters that are ignored. Relativity Administrators can modify the default alphabet file when they create or edit a dtSearch index. For more information, see the Relativity Admin Manual.

An alphabet file contains the following character groups:

- **Letter:** Defined as a searchable character. This category includes all alphabetic characters (a-z and A-Z) and all digits (0-9).

- **Space:** Defined as a character that causes a word break. For example, if a period (".") is classified as a space character, then dtSearch will process U.S.A. as three separate words: U, S and A.
- **Ignore:** Defined as a character that is disregarded in processing text. For example, if a period is classified as an ignore character, then dtSearch will process U.S.A. as one word: USA.

6.4.5.2 Default Noise Word List

The dtSearch engine is configured with the default noise words listed in the following table. Relativity Administrators can modify this list when they create or edit a dtSearch index. For more information, see the Relativity Admin Manual.

Begins with...	Noise Words
A	a, about, after, all, also, an, another, any, are, as, and, at
B	be, because, been, before, being, between, but, both, by
C	came, can, come, could
D	did, do
E	each, even
F	for, from, further, furthermore
G	get, got
H	has, had, he, have, her, here, him, himself, his, how, hi, however
I	i, if, in, into, is, it, its, indeed
J	just
L	like
M	made, many, me, might, more, moreover, most, much, must, my
N	never, not, now
O	of, on, only, other, our, out, or, over
S	said, same, see, should, since, she, some, still, such
T	take, than, that, the, their, them, then, there, these, therefore, they, this, those, through, to, too, thus
U	under, up
V	very
W	was, way, we, well, were, what, when, where, which, while, who, will, with, would
Y	you, your

6.4.6 Numeric Range Searching

You can use a numeric range search to query for any values that fall within a specified range. To add a numeric range to a search expression, enter the upper and lower bound separated by tildes (~~). For example, "apple w/5 12~~17" returns any document containing "apple" within five words of a number between 12 and 17.

Use the following guidelines when performing a numeric range search:

- A numeric range search includes the upper and lower bounds. In the previous example, 12 and 17 would be retrieved.
- Use only positive integers in a numeric range search.
- A numeric range search treats decimal points and commas as spaces, while it ignores minus signs. For example, "123,456.78" is interpreted as "123 456 78" (that is three separate numbers).

6.4.7 Regular Expressions

With dtSearch, you can use regular expressions to search for complex combinations of characters. Regular expressions must begin with double ##, and be enclosed in double quotation marks (") as illustrated below:

- Apple AND "##199[0-9]"
- Apple AND "##19[0-9]+"

Use the following guides when performing searches with regular expressions:

- A regular expression must match a single whole word. For example, you could not search for "apple pie" with the regular expression "##app.*ie".
- The effect of regular expressions on searching speed is similar to the use of wildcard character (*). Searching is slower when the expression is closer to the beginning of the word. For example, the search for "Appl.*" will be almost as fast as "Apple", while the search for ".*pple" will be much slower.

The following table lists special characters used in regular expressions.

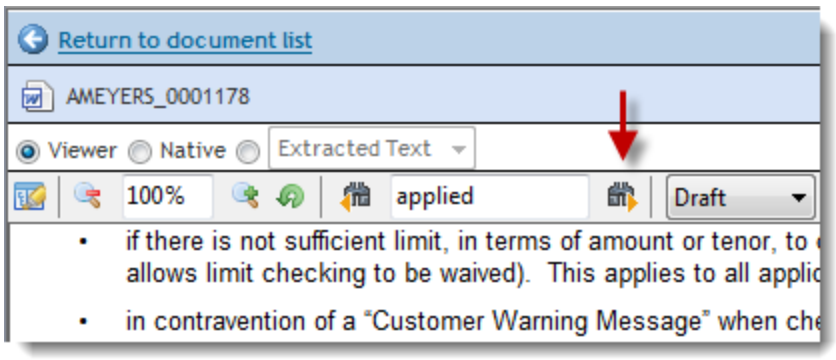
Wildcard	Result
Period (.)	Period matches any single character. For example, "sampl." matches "sample" or "samplZ".
Caret(^)	Caret matches the start of a line. Note: Searches with regular expressions containing special characters for the beginning-of-line (^), or end-of-line regular ($) do not work when run against a dtSearch index. This index does not store information about line breaks.
$	Dollar sign matches the end of a line. **Note:** Searches with regular expressions containing special characters for the beginning-of-line (^), or end-of-line regular ($) do not work when run against a dtSearch index. This index does not store information about line breaks.
\	Backslash indicates that the following character will be treated literally (as the actual character that it represents). For example, "\$100" represents the pattern is "$100", rather than end-of-line ($) character followed by "100". **Note:** The backslash (\) will not operate as a special character if it is defined as a space in the alphabet list of the dtSearch index. To view the alphabet list, select the Search Indexes tab, and click the Edit link for a dtSearch. Scroll down to the Spaces section in the Alphabet box. For more information, see the Relativity Admin Manual.
[abc]	Brackets indicate a set of characters, one of which must be present in a match. For example, "sampl[ae]" matches "sample" or "sampla", but it does not match "samplx".
[a-z]	A dash inside brackets indicates a range of characters. For example, "[a-z]" matches any single lower-case letter.
[^a-z]	A caret inside a bracket indicates any character except the ones in the bracketed range are a match.
Period, Asterisk (.*)	An asterisk indicates "0 or more" of a token. For example, **.*** matches any string of characters. When a search contains this character, no results are returned if the term referenced does not occur in the document set.
Period, Plus Sign (.+)	A plus sign indicates "1 or more" of a token. For example, **.+** matches any string of at least one character.

6.4.8 Stemming

Using the dtSearch engine, you can perform stemming searches, which return documents containing grammatical variations of a root word. The tilde (~) is the character used for stemming searches, and it is added at the end of the root word. For example, a search on "apply~" will return documents containing the words "applying", "applies", "applied", "application", and so on. The dtSearch engine only supports stemming for the English language.

After you perform a stemming search, grammatical variations of the root word are not highlighted in the document result set. For example, the words such as "applied" or "application" are not automatically highlighted in the viewer. You can enter "applied" in the **Find Next** box, and click the **Find Next** icon to locate hits or grammatical variations.

Find Next option

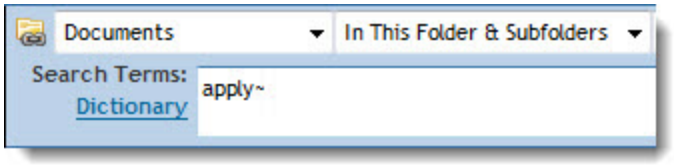

Return to document list
AMEYERS_0001178
Viewer
Native
Extracted Text
100%
applied
Draft
if there is not sufficient limit, in terms of amount or tenor, to
allows limit checking to be waived). This applies to all applic
in contravention of a "Customer Warning Message" when che

6.4.8.1 Using the Stemming Operator and Enable Stemming Checkbox

In Relativity, you have can use the stemming character (~) or the **Enable Stemming** checkbox to perform stemming searches. The availability of these search options depends on the location where you are running a dtSearch:

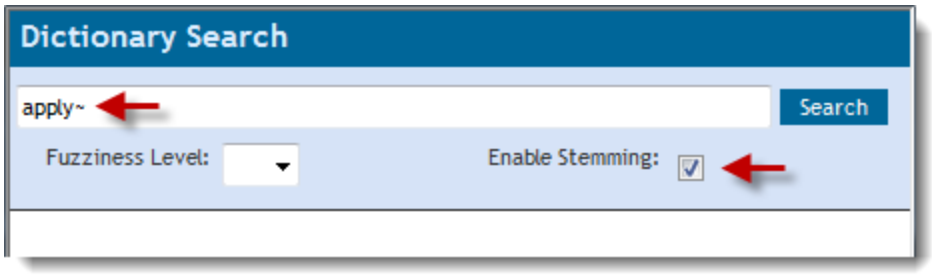
- **Documents tab:** When you select a dtSearch in the **Search With** option, you can use the stemming character (~). See Running a dtSearch on page 49.

  Search Terms box on Documents tab

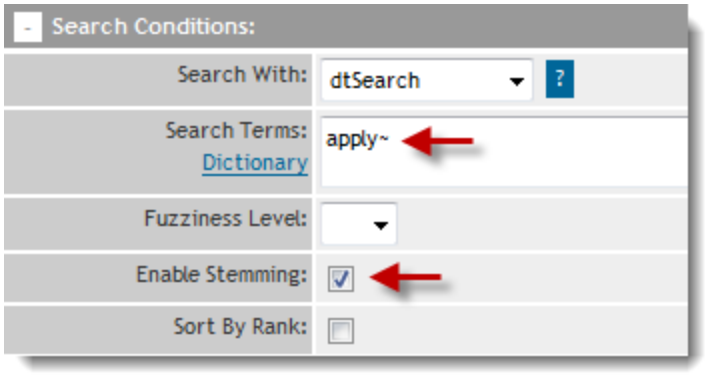
- **Dictionary Search:** When you click the **Dictionary** link, you can use the stemming character (~) and the **Enable Stemming** checkbox on the Dictionary Search dialog. See Running a Dictionary Search on page 50.

Dictionary Search dialog box



- **Saved Search:** When you create a saved search, you can use the stemming character (~) and the **Enable Stemming** checkbox in the Search Conditions section of the form. See Creating or Editing a Saved Search on page 28.

Search Conditions section of Saved Search form



Note: *The* ***Enable Stemming*** *checkbox is independent of the stemming (~) character that you can enter in the* ***Search Terms*** *box or* ***Dictionary Search*** *textbox. A search for "apply~" with* ***Enable Stemming*** *checkbox unselected will return "applied", "applies", or "application". A search for "apply" with* ***Enable Stemming*** *checkbox selected will also return the same results.*

6.4.9 Variable Term Weighting

dtSearch sorts search results so that all words in a request are weighted equally when hits are tallied. However, you can alter this behavior by specifying the relative weights of each term in your search request. For example, the search request "apple:5 AND pear:1" returns the same documents as "apple AND pear", but dtSearch weights "apple" five times as heavily as "pear" when it sorts the results.

6.4.10 Wildcards

The dtSearch engine supports special characters that you can use as wildcards. It also supports the use of leading wildcards (that is wildcards added to the beginning of a word.) The following characters represent wildcards in dtSearches:

Special Character	Function
?	Matches any single character.
=	Matches any single digit.
*	Matches any numbers or characters. (This character slow searches when it is used near the beginning or middle of a word.)
~	Matches words containing grammatical variations of a root word. The tilde (~) is the stemming character available in dtSearches. See Stemming on page 61.

As illustrated in the following table, wildcards can be added to the root of any word to return matching terms from a dtSearch.

Sample Search String	Description of Search Results
appl*	Matches apple, application, and so on.
cipl	Matches principle, participle, and so on.
appl?	Matches apply and apple, but not apples.
ap*ed	Matches applied, approved, and so on.
N===	Matches N123, but not N1234 or Nabc.
apply~	Matches apply, applied, applies, and so on.

6.4.11 W/N Connector

You can use the W/N (Within N words) connector to return documents in a results set when two words or phrases occur within a certain proximity of each other. (N represents a value used to express the number of intervening words.) For example, the search expression "apple W/5 pear" returns documents that contain "apple" only when it occurs within 5 words of "pear". The documents returned by the search must contain the terms within the required proximity, such as 5 words.

6.4.11.1 NOT W/N

You can use the NOT W/N (NOT Within N words) connector to exclude documents from a result set when two words or phrases are within a certain proximity of each other. (N represents a value used to express the number of intervening words.)

For example, the search expression "apple NOT W/20 pear" returns documents that contain "apple" when it is separated from "pear" by at least 20 words, or it also returns documents that do not contain "pear". Documents that contain apple separated from "pear" by fewer than 20 words are not returned. In another example, the search expression "pear NOT W/20 apple" returns documents that contain "pear" when it is separated from "apple" by at least 20 words, or documents that do not contain "apple".

The NOT W/N is not symmetrical, so that the search expression "apple NOT W/20 pear" is not equivalent to "pear NOT W/20 apple". (In contrast, the W/N connector is symmetrical.)

6.4.11.2 Complex Expressions

You can create complex expressions with the W/N connector by connecting words or phrases. At least one of these expressions must be a single word, phrase, or group of words and phrases connected by an OR operator as illustrated below:

- (apple AND banana) W/10 (pear OR grape)
- (apple AND banana) W/10 (orange tree)

Avoid creating complex expressions that produce ambiguous results as illustrated in the following examples:

- (apple AND banana) W/10 (pear AND grape)
- (apple w/10 banana) w/10 (pear and grape)

Note: *dtSearch will display a warning message when you enter an ambiguous search request.*

6.4.12 Words and Phrase

With a dtSearch, you can use quotation marks to search for a phrase. For example, the phrase "fruit salad" is included in the search string "apple w/5 fruit salad". The following list outlines how dtSearch queries on words or phrases with noise words or punctuation:

- **Phrases with Noise Words:** dtSearch skips any noise words in a phrase. For example, its skips "of" in the search string "Statue of Liberty", and retrieves any documents that contains "statue", an intervening word, and "liberty".
- **Words with Punctuation:** Punctuation inside a word is treated as a space. For example, dtSearch treats the search term "can't" as two words, "can" and "t".
- **Numbers and Characters in Parenthesis:** Unexpected results may be returned when numbers or characters in parenthesis are used in a dtSearch. For example, the search term "1843 (c)(8)(ii)" is treated as four words.

7 RELATIVITY ANALYTICS

Relativity Analytics supports conceptual searching of unstructured text. With its language independent and self-training capabilities, Analytics *learns* about the conceptual relationships as it processes data. It uses an index to identify similar ideas or concepts within a document set, rather than matching specific search terms or character strings as done by traditional search engines. The use of mathematically-based technology called Latent Semantic Indexing (LSI) provides Analytics with the capability to identify relationship patterns between terms and concepts without utilizing pre-established word lists, dictionaries, or linguistic techniques (such as sentence structures). Analytics can rapidly classify and sort data, as well as identify relevant documents that other searching techniques overlook.

You can use Relativity Analytics to perform the following searching techniques:

- **Conceptual Term Searching:** Returns documents that contain concepts similar to your search terms or phrases.
- **Keyword Expansion:** Returns keywords that conceptually match your search term.
- **Categorization:** Uses a set of example documents as the basis for categorizing other conceptually similar documents.
- **Clustering:** Identifies and groups conceptually similar documents in a workspace using an existing Relativity Analytics index. It does not require a training or example set of documents.
- **Find Similar Documents:** Uses the document currently displayed in the viewer to identify other conceptually correlated documents.
- **Similar Document Detection:** Identifies groups of highly correlated documents and displays them as related items in Relativity.

Note: *Your workspace must contain a conceptual index in order for you to use the searching features of Relativity Analytics. Contact your Relativity Administrator for additional information about active conceptual indexes in your workspace. For information about index creation, see the Relativity Admin Manual.*

7.1 Concept Searches

You can perform a concept search on a word or phrase to identify conceptually-correlated documents. While the documents returned by a concept search may not include exact matches to your search terms, they will contain similar concepts or ideas. For example, you can use this search to return documents that contain concepts similar to a key clause in a contract, or in a report summary.

In addition, you can use concept searches in conjunction with keyword searches. Since a keyword can have multiple meanings, you can use a concept search to limit keyword search results by returning only documents that contain the keyword used in similar conceptual contexts.

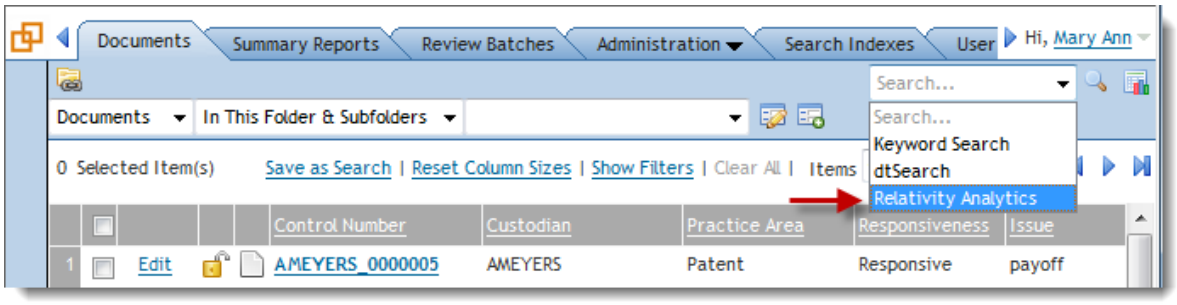
7.1.1 Running a Concept Search from the Documents Tab

Use the following steps to run a concept search from the Documents tab:

1. On the Documents tab, click the **Search With** drop-down, and select an Analytics index from the list. The available Analytics indexes vary by workspace, so you may want to consult your Relativity

Administrator for additional information.

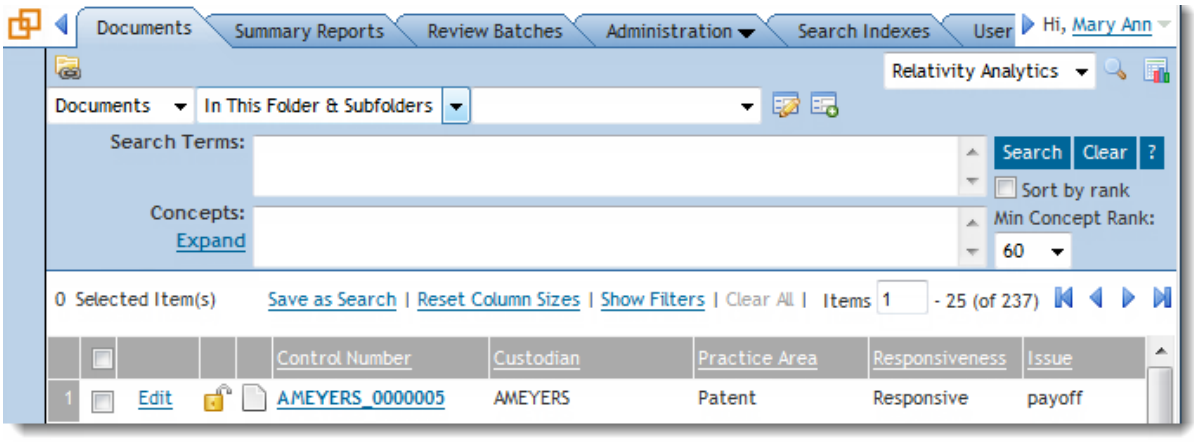
Analytics Index in Search With box



2. Perform one or more of the following tasks:
   - In the **Search Terms** box, enter words or phrases to run a dtSearch. You can click **Clear** to remove the current search terms.

     This functionality is only available if Relativity has been configured to create a dtSearch index based on the selected Analytics index. For information about this configuration option, refer to the Relativity Admin Manual.

     Search Terms and Concepts boxes

   - In the **Concepts** box, enter terms for a conceptual term search.

     > ***Note:*** *You will obtain better results if you enter a block of text, rather than a single word. Single word entries return broad, unreliable results.*

   - To perform keyword expansion, click **Expand** to determine if other words in the document set are conceptually similar to your search term. See Running Keyword Expansion from the Documents Tab on page 68.
3. (Optional) To display fields for search conditions, click the **Search Conditions** icon located next to the **Search With** drop-down. See Search Conditions on page 23.
4. Choose any of these optional settings to control how your results are displayed:
   - Click **Sort by Rank** to order the documents in the result set by relevance. The most relevant documents are displayed at the top of the list.

- Click **Min Concept Rank** to set the ranking for a minimum level of conceptual correlation. The result set will contain only documents that meet this minimum correlation level.

5. Click **Search**.

7.1.2 Running a Concept Search in the Viewer

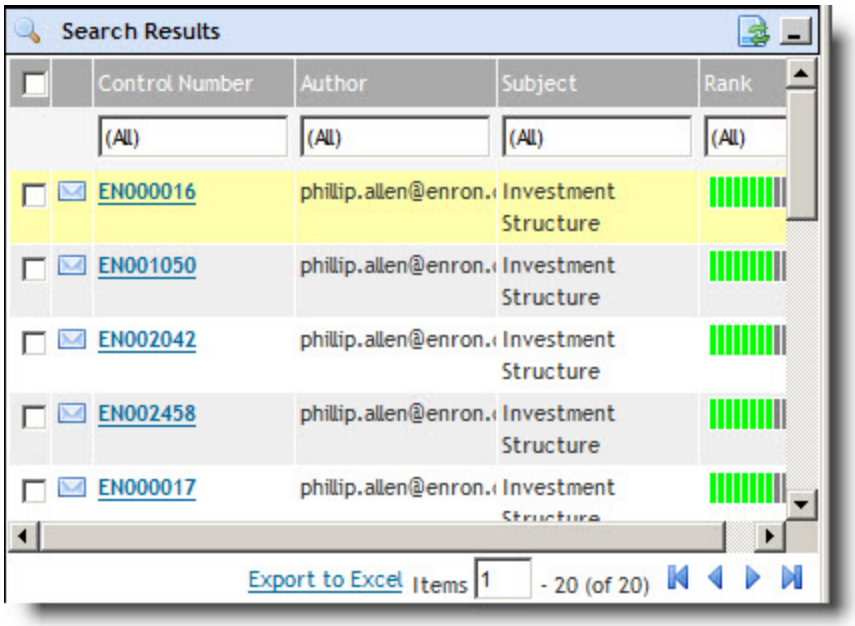
Use the following steps to run a concept search in the viewer:

1. Open a document in the Relativity viewer.
2. Highlight a section of text.
3. Right-click on the highlighted text. Select **Analytics**, and click **Concept Search**.

Concept Search option

4. Review the conceptual hits in the Search Results Related Items pane. The results are sorted by rank.

Search Results related items pane



7.2 Keyword Expansion

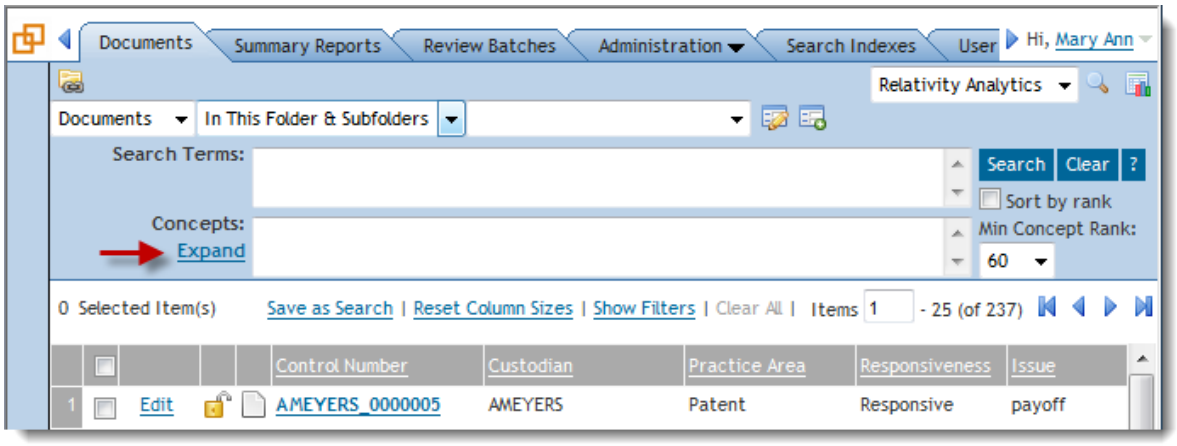
You can use keyword expansion on a word to identify other conceptually correlated terms. Keyword Expansion is available on the Documents tab through an Analytics search. When you select an Analytics index, you can click **Expand** to display the Conceptual Keyword Expansion pop-up. You can also use Keyword Expansion in the Viewer from the right-click menu. In the Viewer, you can automatically populate the Conceptual Keyword Expansion box by highlighting text in a document.

7.2.1 Running Keyword Expansion from the Documents Tab

Use the following steps to run a keyword expansion from the Documents tab:

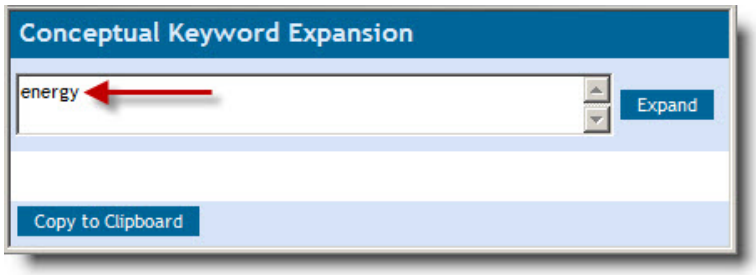
1. Navigate to the Documents tab.
2. In the **Search With** drop-down, select an **Analytics** index. See Running a Concept Search from the Documents Tab on page 65.

Expand link



3. Click **Expand** to determine if other words in the document set are conceptually similar to your search term.

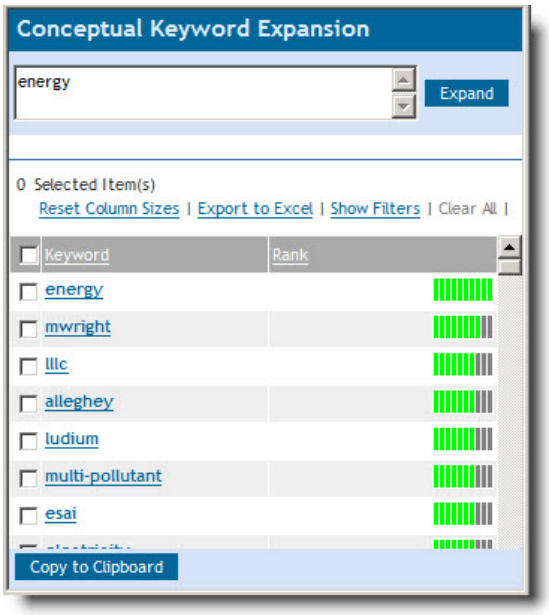
Conceptual Keyword Expansion dialog box



4. Enter one or more search terms in the text box. Click the **Expand** button to display a list of keywords and their rank. The result set contains keywords that represent concepts similar to the search terms.

> ***Note:*** *You can expand a keyword in the results set. Click on the keyword link to add the term to the textbox, and click the* ***Expand*** *button. The new results are displayed in the grid.*

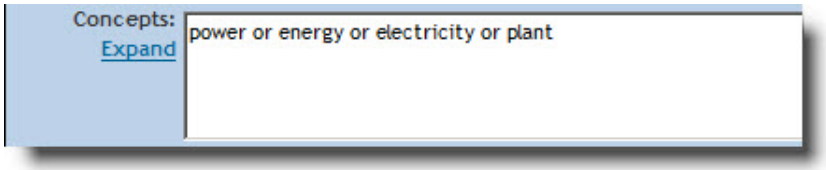
Conceptual Keyword Expansion results



5. Perform any of the following tasks with your search results:

   - **Copy to Clipboard:** Select the checkboxes for the terms that you want to copy, and click **Copy to Clipboard**. On the Documents tab, right-click in the **Search Terms** or **Concepts** box, and click **Paste**. The terms will added to the textbox separated by the OR operator.

     Keywords to expand

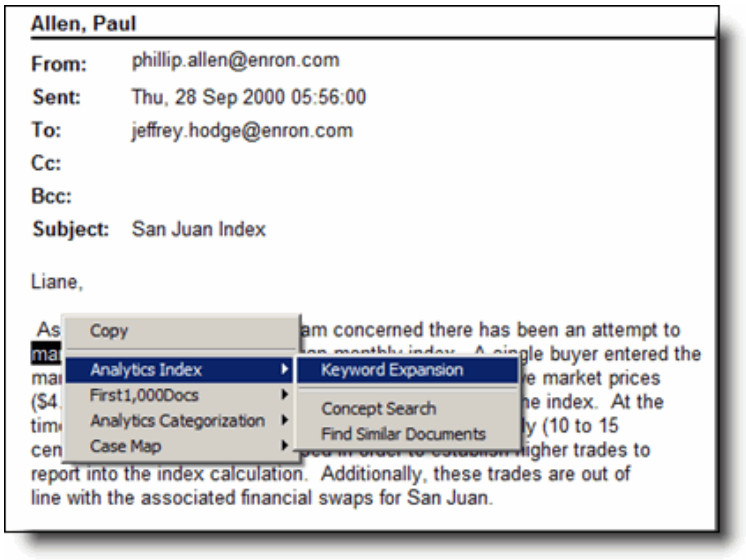
   - **Sort:** Click a column header to sort in descending or ascending order.
   - **Reset Columns Sizes:** Displays columns with their default widths.
   - **Export to Excel:** Click this link to download an Excel spreadsheet containing the keywords and totals from the dictionary search.
   - **Show Filters and Clear All:** See Using Filters on page 8.

7.2.2 Running Keyword Expansion in the Viewer

Use the following steps to run a keyword expansion in the viewer:

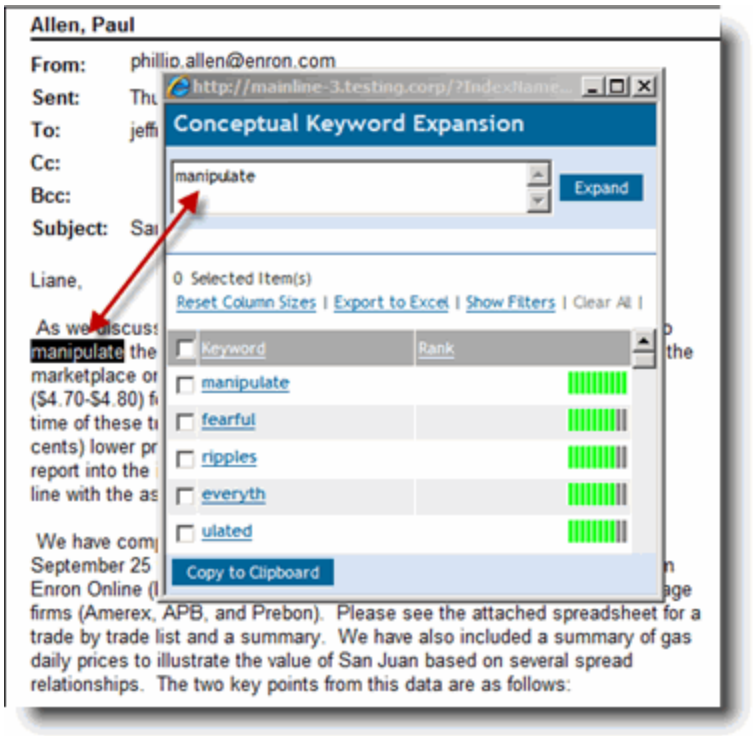
1. Open a document in the Relativity viewer.
2. Highlight a section of text.
3. Right-click on the highlighted text. Select **Analytics**, and click **Keyword Expansion**. The viewer automatically adds the highlighted text to the Conceptual Keyword Expansion box.

Keyword Expansion option



4. Review the results of the keyword expansion based on the text that you selected.

Conceptual Keyword Expansion


Allen, Paul
Conceptual Keyword Expansion
manipulate
Expand
0 Selected Item(s)
Reset Column Sizes | Export to Excel | Show Filters | Clear All
Keyword
Rank
manipulate
fearful
ripples
everyth
ulated
Copy to Clipboard
firms (Amerex, APB, and Prebon). Please see the attached spreadsheet for a
trade by trade list and a summary. We have also included a summary of gas
daily prices to illustrate the value of San Juan based on several spread
relationships. The two key points from this data are as follows:

Note: *You can expand a keyword in the results set. Click on the keyword link to add the term to the text box, and click the* ***Expand*** *button. The new results are displayed in the grid.*

7.3 Categorization

Using categorization, you can create a set of example documents that Analytics uses as the basis for identifying and grouping other conceptually similar documents. You may want to use categorization early in a review when you understand key concepts of a case and can identify documents that are representative examples of these concepts. As you review documents in the Relativity viewer, you can designate examples and add them to various categories.

To improve the quality of your categorization results, use categories that represent a specific case issue or designation. A good example document clearly and concisely represents a single aspect of its category. Extremely short documents do not contain enough information for efficient categorization, while long documents with broad content result in unfocused categorization hits. You do not need to include redundant examples in your categories. For more information, see Adding Documents as Categorization Examples on page 72 or Adding Excerpts as Categorization Examples on page 73.

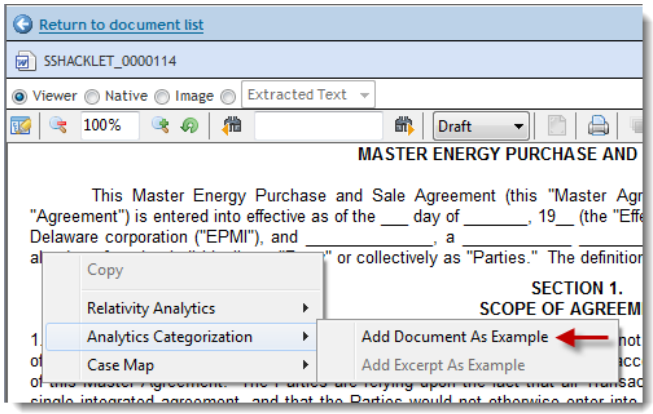
When you have finished categorizing the documents, ask your Relativity Administrator to run the categorization process. During this process, Analytics examines the categories and examples, and then tags all the documents that are conceptually correlated to the examples. You can view your results in the Field Tree. See Viewing Categorization Results in the Field Tree on page 76.

7.3.1 Adding Documents as Categorization Examples

Use the following steps to add a document as a categorization example:

1. Open a document in the Relativity viewer.
2. Right-click inside the document to display the menu options.

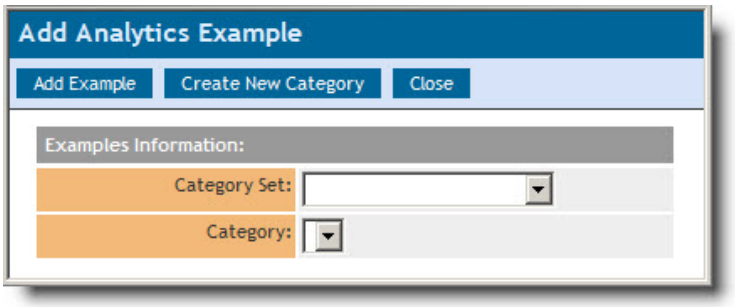
Add Document as Example option



3. Select **Analytics Categorization**, and click **Add Document as Example** to display the Add Analytics Example pop-up.

> ***Note:*** *You can also add new categories from this pop-up. See Creating a New Category on page 74.*

Add Analytics Example pop-up



4. Select a set from the **Category Set** drop-down box.
5. Select a **Category**. Your document will be added to this category within the selected category set.
6. Click **Add Example**. The document is now an example within the category set.

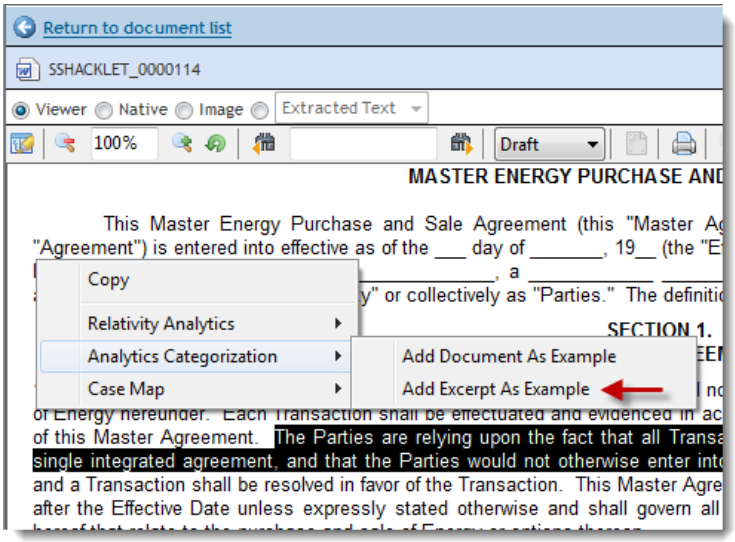
> ***Note:*** *When you have finished categorizing example documents, ask your Relativity Administrator to run the categorization process. During this process, Analytics examines the categories and examples, and then tags all the documents that are conceptually correlated to the examples. You can view your results in the Field Tree. See Viewing Categorization Results in the Field Tree on page 76.*

7.3.2 Adding Excerpts as Categorization Examples

Use the following steps to add a text excerpt as a categorization example:

1. Open a document in the Relativity viewer.
2. Highlight a selection of text, and right-click to the display menu options.

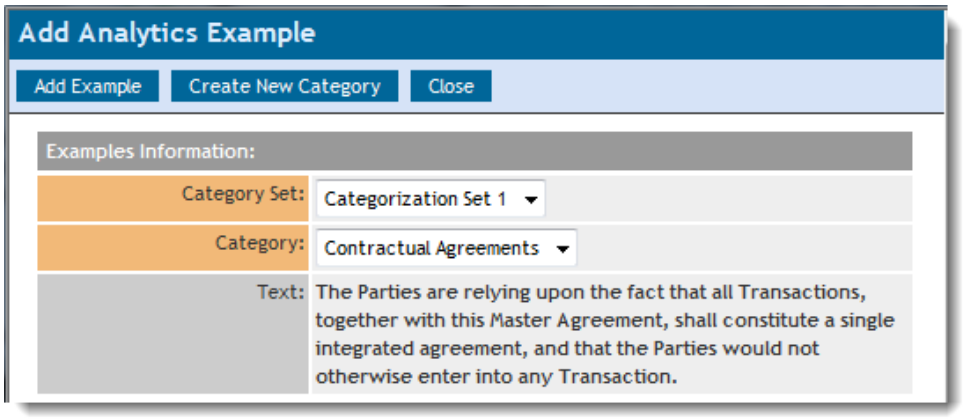
Add Excerpt as Example option


Return to document list
SSHACKLET_0000114
Viewer
Native
Image
Extracted Text
100%
Draft
MASTER ENERGY PURCHASE AND
This Master Energy Purchase and Sale Agreement (this "Master Ag
"Agreement") is entered into effective as of the ___ day of _____, 19__ (the "E
Copy
Relativity Analytics
Analytics Categorization
Case Map
Add Document As Example
Add Excerpt As Example
SECTION 1.
of this Master Agreement. The Parties are relying upon the fact that all Transa
single integrated agreement, and that the Parties would not otherwise enter into
and a Transaction shall be resolved in favor of the Transaction. This Master Agre
after the Effective Date unless expressly stated otherwise and shall govern all

3. Select **Analytics Categorization**, and click **Add Excerpt as Example** to display the Add Analytics Example pop-up.

> ***Note:*** *You can also add new categories from this pop-up. See Creating a New Category on page 74.*

Add Analytics Example pop-up


Add Analytics Example
Add Example
Create New Category
Close
Examples Information:
Category Set:
Categorization Set 1
Category:
Contractual Agreements
Text:
The Parties are relying upon the fact that all Transactions, together with this Master Agreement, shall constitute a single integrated agreement, and that the Parties would not otherwise enter into any Transaction.

4. Select a set from the **Category Set** drop-down box.
5. Select a **Category**. Your excerpt will be added to this category within the selected category set.
6. Review the content of the read-only **Text** field. This option displays the text that you highlighted in the viewer, and that will be added as a categorization example. If you want to modify your selection, click **Close**.
7. Click **Add Example**. The excerpt is now an example within the category set.

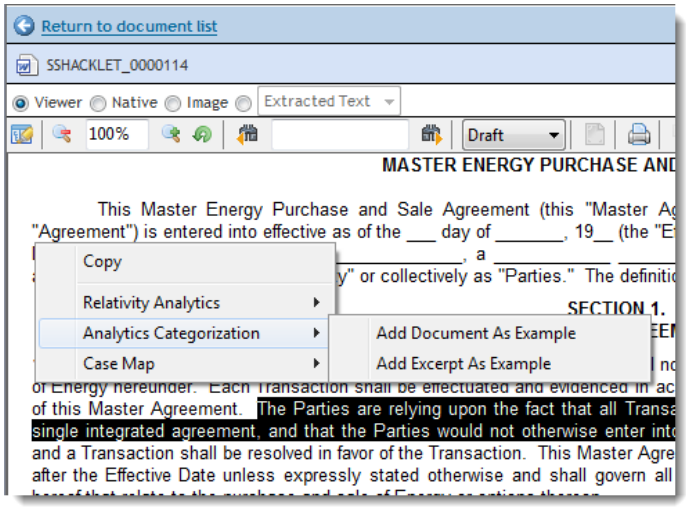
> ***Note:*** *When you have finished categorizing example documents, ask your Relativity Administrator to run the categorization process. During this process, Analytics examines the categories and examples, and then tags all the documents that are conceptually correlated to the examples. You can view your results in the Field Tree. See Viewing Categorization Results in the Field Tree on page 76.*

7.3.3 Creating a New Category

Use the following steps to create a new category:

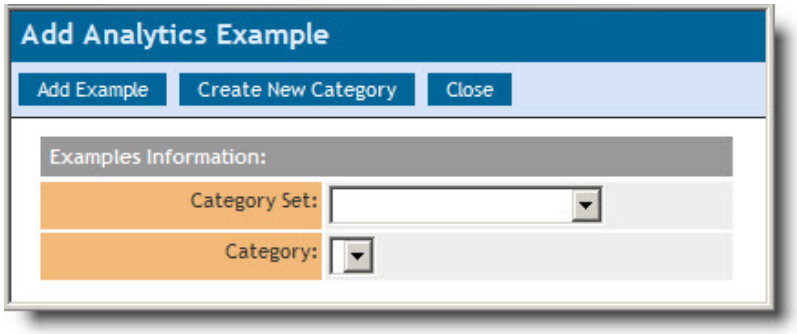
1. Open a document in the Relativity viewer.
2. Right-click inside the document to display the menu options.

Analytics Categorization menu options


Return to document list
SSHACKLET_0000114
Viewer
Native
Image
Extracted Text
100%
Draft
MASTER ENERGY PURCHASE AND
This Master Energy Purchase and Sale Agreement (this "Master Ag
"Agreement") is entered into effective as of the ___ day of _____, 19__ (the "E
Copy
Relativity Analytics
Analytics Categorization
Case Map
Add Document As Example
Add Excerpt As Example
SECTION 1.
of this Master Agreement. The Parties are relying upon the fact that all Transa
single integrated agreement, and that the Parties would not otherwise enter into
and a Transaction shall be resolved in favor of the Transaction. This Master Agre
after the Effective Date unless expressly stated otherwise and shall govern all

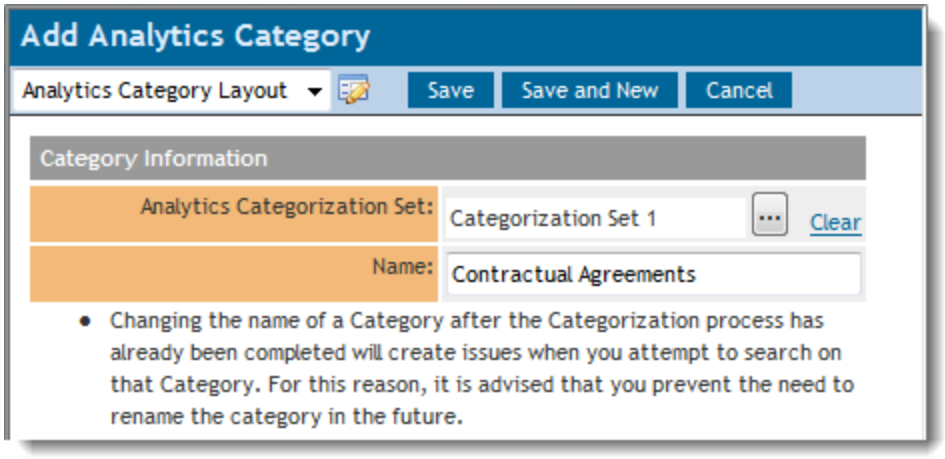
3. Select **Analytics Categorization**, and click either of the menu options to display the Add Analytics Example pop-up. For more information, see Adding Documents as Categorization Examples on page 72 or Adding Excerpts as Categorization Examples on page 73.

   Example of the Add Analytics Example pop-up



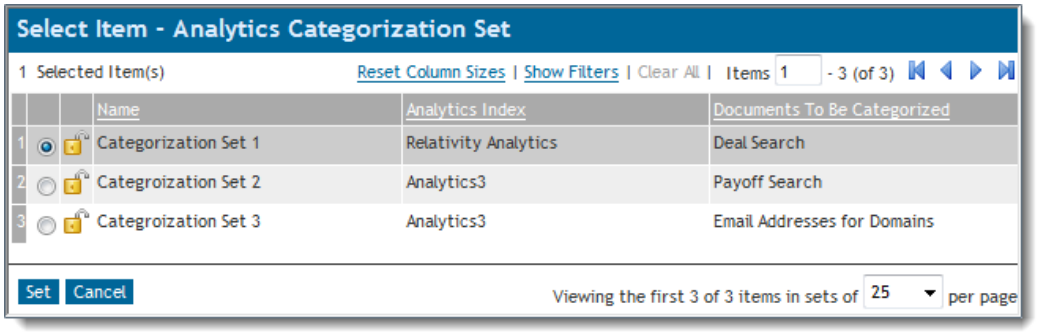
4. Click **Create New Category**.

   Add Analytics Category pop-up


Add Analytics Category
Analytics Category Layout
Save
Save and New
Cancel
Category Information
Analytics Categorization Set:
Categorization Set 1
Clear
Name:
Contractual Agreements
Changing the name of a Category after the Categorization process has already been completed will create issues when you attempt to search on that Category. For this reason, it is advised that you prevent the need to rename the category in the future.

5. To select an **Analytics Categorization Set**, click the ellipsis to display a pop-up.

   Select Item pop-up

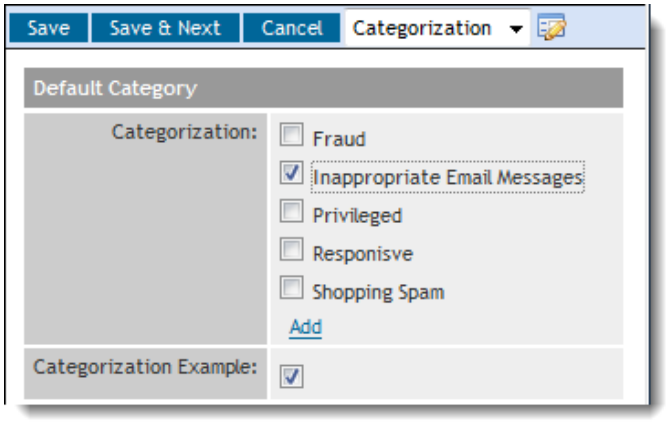

Select Item - Analytics Categorization Set
1 Selected Item(s)
Reset Column Sizes | Show Filters | Clear All | Items 1 - 3 (of 3)
Name
Analytics Index
Documents To Be Categorized
1 Categorization Set 1 Relativity Analytics Deal Search
2 Categroization Set 2 Analytics3 Payoff Search
3 Categroization Set 3 Analytics3 Email Addresses for Domains
Set
Cancel
Viewing the first 3 of 3 items in sets of 25 per page

6. On the Select Item pop-up, select a categorization set, and click **Set**.
7. On the Add Analytics Category pop-up, enter a title for the new category in the **Name** box.
8. Click **Save**. The category is now available for selection on the Add Analytics Example pop-up. (You can also continue adding categories by clicking **Save and New**.)

7.3.4 Adding Categorization Examples Using Layouts

You can also identify documents as categorization examples, or create new categories using specialized layouts. When you perform these tasks with layouts, you do not need to use the clustering feature in an Analytics index. You may want to use this approach to categorization if you have only limited knowledge of your workspace data. Your Relativity Administrator can create a special layout for identifying the categories and their examples as illustrated below.

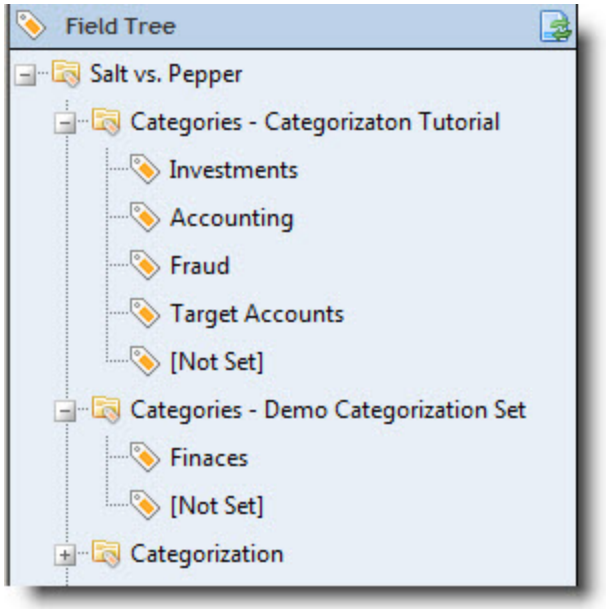
Categorization using a layout



7.3.5 Viewing Categorization Results in the Field Tree

After a categorization job is completed, you can view the results in the Field Tree. All category set names are appended with the word "Category" in the format "Category - <Name of Categorization Set>". Click the **Expand** icon (+) to display a list of categories in the set.

Categories in Field Tree



In the previous illustration, one of the categorization sets is named Categorization Tutorial, which contains the categories Investments, Accounting, Fraud, and so on.

Note: *Your Relativity Administrator must run the categorization process in order for your results to be displayed in the Field Tree. During this process, Analytics examines the categories and examples, and then tags all the documents that are conceptually correlated to the examples. Contact your Administrator if the Field Tree does not display your categorization results.*

7.3.6 Searching on Categorization Results

You can use a saved search to query on categorization results by setting Condition values based on the categories added to a categorization set. For example, you could create a saved search for all the documents in the Arabic category of a Primary Language Identification set that you created.

Use the following steps to create a saved search for categorization results:

1. To create a new search, display the Saved Search form. See Creating or Editing a Saved Search on page 28.
2. In the Conditions section, select a field. For the sample query, you would select **Categories – Primary Language Identification**.

   Conditions section of Saved Search form

3. Select **these conditions** as the **Operator**.
4. Click the ellipsis in the **Value** box. Select the required values. See Saved Search Form on page 29.
5. Click **Save & Search**.
6. Review the results of the search. The saved search will display the same number of documents as you would see by filtering for Arabic in the Categories Field Tree view.

7.4 Clustering

Relativity Analytics supports clustering for grouping conceptually similar documents. With this feature, you can identify conceptual groups in a workspace or subset of documents by using an existing Relativity Analytics index. Analytics creates clusters (that is document groups) based on your selected documents without requiring example documents as used in categorization. You can view the clusters identified by the index in the Clusters browser available on the Documents tab.

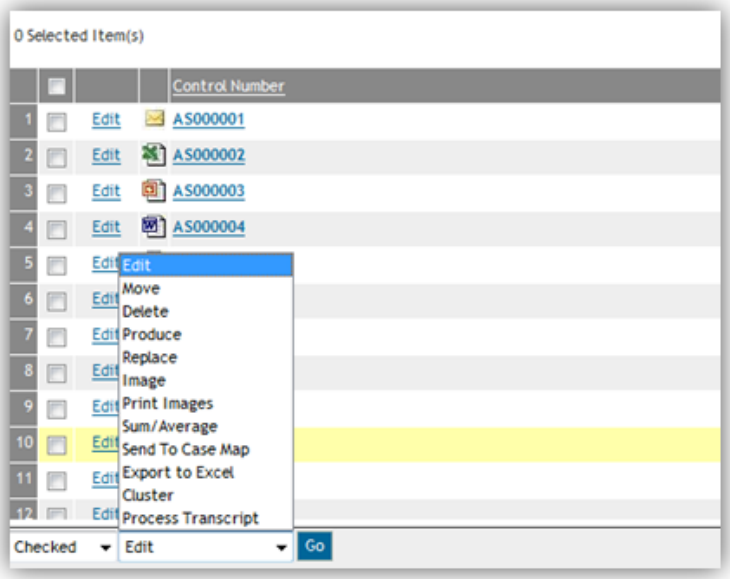
Note: *For information about creating a Relativity Analytics index, see the Relativity Admin Manual.*

7.4.1 Creating or Replacing a Cluster

You can create new clusters or replace existing ones without defining an example set of documents. The steps for these tasks are similar, except that you will need to select an existing cluster when you perform a replacement.

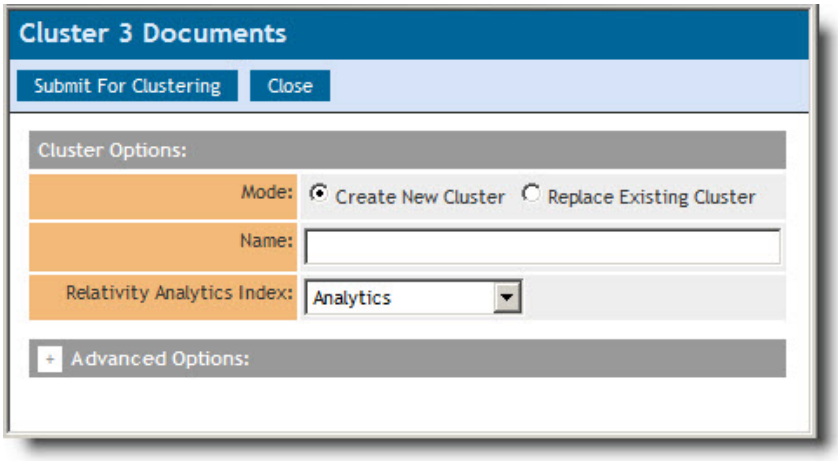
1. On the Documents tab, confirm that the item list includes the documents required for clustering. Only the documents in the current returned set will be grouped into clusters by the Relativity Analytics index.
2. To choose documents for clustering, select **All** searchable items, **Checked** items or **These** items in the current returned set.

Mass operation options



3. Select **Cluster** and click **Go** to display the Cluster dialog box.

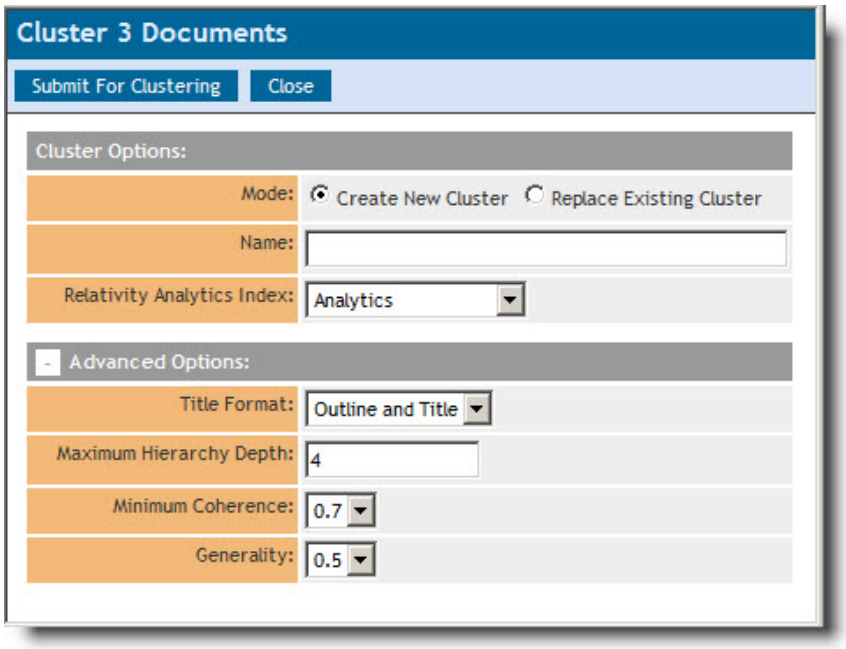
Cluster dialog box



4. Perform the following tasks:
   - Select **Create New Cluster**. (If you are replacing a cluster, select **Replace Existing Cluster**.)
   - Enter a **Name** for the cluster. (If you are replacing a cluster, the **Name** box displays as a drop-down, so you can select a cluster for replacement.)
   - Select the **Relativity Analytics Index** that you want to use for clustering your documents.

5. To display Advanced Options, click the **Expand** icon (+).

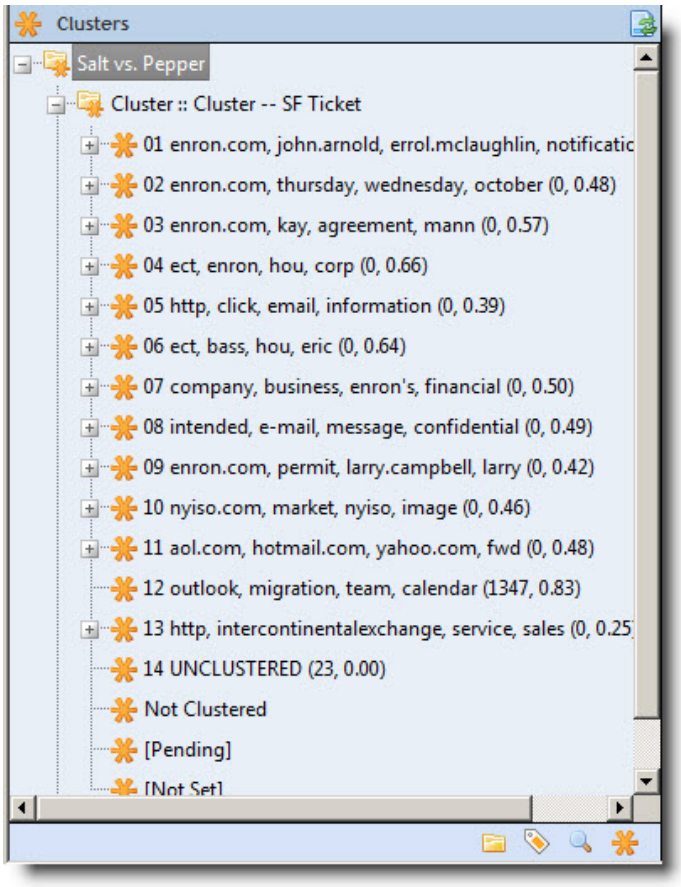
Advanced Options for clustering



6. Perform the following tasks:
   - Select a **Title Format** to determine how the clusters are named.
   - In the **Maximum Hierarchy Depth** box, enter a value to indicate the number of levels in a cluster hierarchy. For example, a value of 1 results in the creation of only top level clusters. The default value is 4 levels.
   - For the **Minimum Coherence** option, select a value that represents the level of conceptual correlation that the items must have to be included in the same cluster. The default coherence value is 0.7.
   - For the **Generality** option, select a value that represents the level of generality required for the cluster. Values range from 0 (most general level) to 1 (most specific). When the generality is set to a higher value, fewer top level clusters will be created. The default value for generality is 0.5.

7. Click **Submit for Clustering**. Relativity displays the clusters in the Clusters browser.

Cluster browser


Clusters
Salt vs. Pepper
Cluster :: Cluster -- SF Ticket
01 enron.com, john.arnold, errol.mclaughlin, notificatic
02 enron.com, thursday, wednesday, october (0, 0.48)
03 enron.com, kay, agreement, mann (0, 0.57)
04 ect, enron, hou, corp (0, 0.66)
05 http, click, email, information (0, 0.39)
06 ect, bass, hou, eric (0, 0.64)
07 company, business, enron's, financial (0, 0.50)
08 intended, e-mail, message, confidential (0, 0.49)
09 enron.com, permit, larry.campbell, larry (0, 0.42)
10 nyiso.com, market, nyiso, image (0, 0.46)
11 aol.com, hotmail.com, yahoo.com, fwd (0, 0.48)
12 outlook, migration, team, calendar (1347, 0.83)
13 http, intercontinentalexchange, service, sales (0, 0.25
14 UNCLUSTERED (23, 0.00)
Not Clustered
[Pending]
[Not Set]

7.5 Finding Similar Documents through the Viewer

You can use the Find Similar Documents option to run a conceptual search on the contents of a specific document. Analytics uses the document currently displayed in the viewer to identify other conceptually correlated documents.

Use the following steps to identify similar documents:

1. Open a document in the Relativity viewer.
2. Right-click in the white space of the document opened in the viewer. This is your primary document.
3. Select **Analytics**, and click **Find Similar Documents**. Relativity Analytics will process all of the content in the primary document, and return other conceptually similar documents that are in the collection.

Find Similar Documents

4. Review the conceptual hits in the Search Results Related Items pane. The results are sorted by rank.

7.6 Similar Document Detection

Similar document detection identifies groups of highly correlated documents and displays them as related items in Relativity. It requires the running of a special process. Contact your Relativity Administrator for more information about the availability of the similar documents related item group for your workspace.

8 FREQUENTLY ASKED QUESTIONS

This section includes frequently asked questions by Relativity users. You can also contact your Relativity Administrator if you need more information.

8.1 Multiple Terms

Why would I receive an error message saying my query is too complex?

Relativity cannot return precise results when a query includes search conditions that are too broad due to the use of multiple search terms. You can avoid this error message by simplifying your search criteria. For example, search for 10 instead of 50 terms in your query. You can save and tag your search results from each simpler query. This approach allows you search on the required terms, while providing better results.

8.2 Proximity Searches

Why are terms in my proximity search highlighted even when they do not match the W/N criteria that I defined?

Relativity highlights terms that meet the requirements of your proximity search as well as the individual search terms. This behavior does not affect the results of your proximity search, which will return the appropriate documents. For example, the results of a proximity search for instances of law within three words of order (that is "law W/3 order") includes highlighted terms of "law" and "order" when they are not within three words of each other. To accommodate this behavior, focus only on the results that match the proximity search criteria, and disregard the other highlighted terms.

8.3 Multiple Conditions

Why do my searches run slowly when I use multiple conditions?

When you add multiple search conditions to a query, Relativity searches on these conditions relative to each other, which slows down the return of your results. For example, you experience slow performance when running a query on all e-mail messages received "after June 1", and "before June 30" of the same year. You can improve performance by using as few conditions as possible, such as excluding the condition "before June 30". Run the query with only the condition "after June 1", and then sort or filter your results to display messages received between the desired dates.

8.4 Nesting Searches

Can I nest multiple searches in a saved search?

For performance reasons, kCura does not recommend nesting multiple searches in a saved search. You can select a search as a condition, but using multiple searches as conditions will slow down the return of your results. See Using Saved Searches as Conditions (Combined Searches) on page 43.

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